

# BxInventory

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USER MANUAL

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## Introduction to BxInventory

### What is BxInventory?

BxInventory is a completely redesigned **cloud-based** system based on our two separate systems: BxOrders and BxItems. BxInventory is a secure cloud-based system with complete sets of tools to manage purchase orders and track item storage information. BxInventory features seamless integration of order request management with item storage tracking.

### Overview

**Purchase Order Tracking:** while lab members can submit purchase order requests online, lab managers can confirm and approve requests, purchase items, and check off received items.


This module helps manage inventory costs with well-designed ordering processes, convenient tools to review historic requests and orders, and real-time summary reports for fund usage.


**Item Location Tracking:** Users can build storage hierarchy and record item storage information online quickly. With a web browser, users are ready to locate samples, move them between locations, track item usages and identify low-stock or expiring reagents.

With great flexibility and expandability, many small research laboratories, core facilities, and biotech companies have already adopted BxInventory.

### Get Started

To start using BxInventory, please follow these steps:

1. Open a web browser (e.g., Google Chrome) and go to BioInfoRx website at <http://bioinforx.com/>
2. Go to BxInventory website by clicking on the icon:  or go to web address <http://bioinforx.com/bxinventory/>
3. If you don't have a BioInfoRx account yet, **sign up** for a free account. Otherwise, **sign in** directly.



**Sign In BioInfoRx Account**

Login ID:

Forgot your login ID? Try using your email.

Password:

Jump to App: BxInventory



[» I forgot my password](#)

[» Create a BioInfoRx Account now for Free](#)

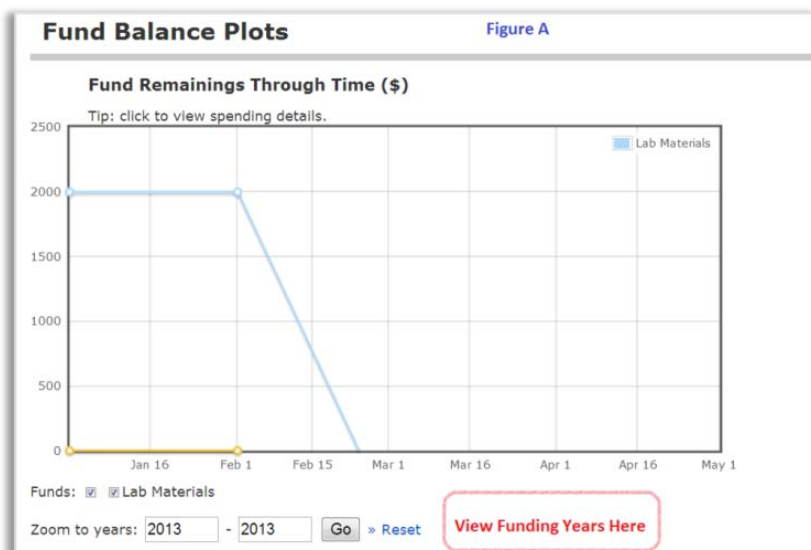
## Section 1: BxInventory Home Screen

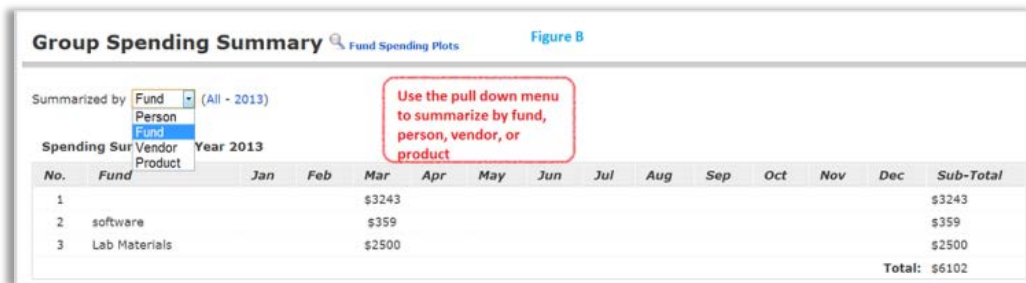
The BxInventory Home Screen is the first screen you will see when you log into the program. From here, you can get started using BxInventory.

The screenshot displays the BxInventory Home Screen. On the left is a navigation sidebar with links for Summary, Settings, and Help. Below these are sections for Reminders (0), Pending Requests (0), Manage Orders (Requests, Vendors, Products, Funds), Track Items (Containers, Items, Check In/Out/Relocate), Container Tree, Item Cart (0), and Target (Not set yet). The main content area on the right is titled 'BxInventory: Lab Ordering and Item Tracking Solutions' and includes an Overview link. It features three main sections: 'Get Started' with links to demo data and Excel templates, 'Ordering' with a Pending Requests (0) summary and links to Settings, Add Products, Submit Purchase Requests, and Search Requests, and 'Item Tracking' with links to Add Containers, Add Items, Search Items, and Store Items in Containers.

### 1.1: Fund Spending Plots and Review Group Spending Summary

To review your fund spending, click [Fund Spending Plots](#) to see a plot graph of your overall spending and your group-spending summary. **Figure A** shows your funds spent and remaining. **Figure B** shows your group-spending summary.





## 1.2: Settings

Manage your BxInventory Settings before getting started. The Group Manager does this. From the [Home Screen](#), click [Settings](#) and set up your system (See [Section 3, Setting Up BxInventory](#)).

**Set up System**

Group Manager can complete these before getting started.

Note, if the system is not set, default settings will be used.

1. [Set up Ordering Procedures](#) (default: Request -> Receive)
2. [Set up BxOrders User Permissions](#) (default: all permissions for all group members)
3. [Set up BxItems User Permissions](#) (default: all permissions for all group members)
4. Customize Database Fields:
  1. [Containers](#) (Where you can place items in)
  2. [Items](#) (What you have in laboratory)
  3. [Requests](#) (Order requests submitted)
  4. [Products](#) (What you can purchase)
  5. [Vendors](#) (Companies products are purchased from)
  6. [Grants and Project Funds](#) (Money to purchase items)

## 1.3: Add Demo Data and Download Excel Template

If you would like to add some demo data to try out the system, or download Excel Templates for demo purposes, click on the links on the home page. You will learn more about importing data in sections 3 and 4.

## 1.4: Manage Purchase Orders

The [Ordering](#) section will allow you to add vendors and products, submit purchase requests, or process order requests. These functions are covered in detail in [Section 3](#).

**Ordering**

**Pending Requests (0):** Receive (0)

[Settings](#)
[Add Products](#)
[Submit Purchase Requests](#)
[Search Requests](#)

## 1.5: Track Item Storage Information

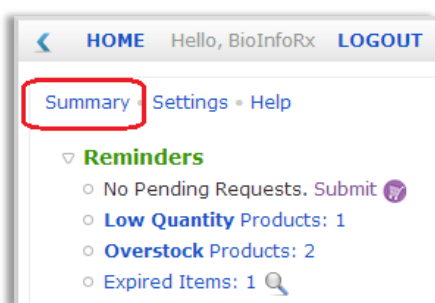
The **Item Tracking** area will allow you to add containers and items, and store your items. These functions are covered in detail in **Section 4**.

**Item Tracking**

[Add Containers](#) [Add Items](#) [Search Items](#) [Store Items in Containers](#)

## Section 2: BxInventory Summary Screen

Click the **Summary** link at the top right of the screen to view your inventory summary.



The summary screen contains reminders, database statistics, and your group spending summary.

All Products

All Items

**Reminders**

**Database Statistics**

**Reminders**

**Database Statistics**

**Group Spending Summary**

**Group Spending Summary**

Summarized by:  (All - 2013)

Spending Summary in Year 2013

No.	Person	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sub-Total
1	Demo, BioInfoRx			\$6102										\$6102
														Total: \$6102



## 2.1: Reminders

### 2.1.1: Pending Requests

If you have pending order requests, you will see a [To Be Received](#) link in your reminders. Click the link to mark the item as received.

**Check off Received Products** [Search Requests](#)

Check off Received Products Set All Status To: **Received** Use the pulldown menu to receive, reject, or cancel a request.

Batch #	Date	Person	Product	Vendor	Catalog	Fund	Price	Quantity	Notes	Edit
<input checked="" type="checkbox"/> 10002	2013-04-04	Demo, BioInfoRx	Lab Bench	Neoclone	0009988	Lab Materials	2500.00	9		

Select batches: ☐ 10002

Select vendors: ☐ Neoclone

**Check off Received Products** Click here to mark items as received. Received items will automatically be added to your inventory

### 2.1.2: Low Quantity Products

The system will remind you if you have any low quantity products to re-order. Click the [Low Quantity Products](#) link under your reminders to view low quantity items.

**Review Low Quantity Products** [Low Quantity - Overstock - Both - All Products - Search Products](#)

No.	Product	Vendor	Catalog	Unit	Unit Price	Min. Qty	Max. Qty	Quantity
1	Sample 4	Neoclone			\$ 25.00	2	6	1

Tips: Up to 1000 products will be shown here.

Click the shopping cart to order more product

### 2.1.3: Overstock Products

If your items are overstocked, the reminder screen will alert you. Click the [Overstock Products](#) link to view overstocked items.

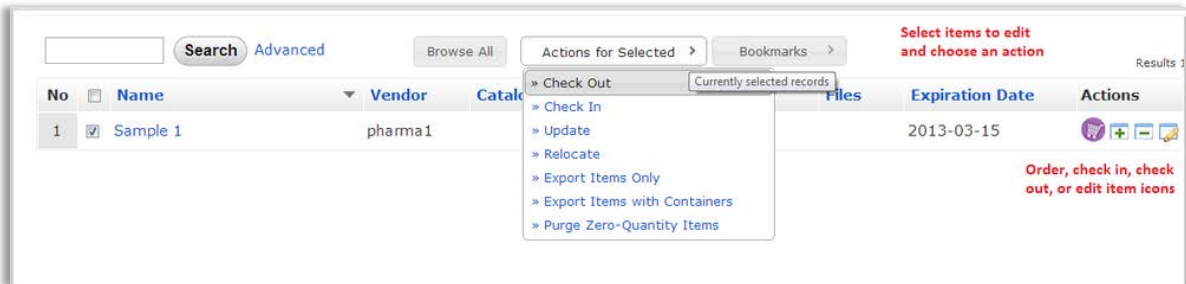
**Review Overstock Products** [Low Quantity - Overstock - Both - All Products - Search Products](#)

No.	Product	Vendor	Catalog	Unit	Unit Price	Min. Qty	Max. Qty	Quantity
1	BxItems	Bioinforx			\$359.00	0	1	3
2	Lab Bench	Neoclone	0009988		\$2500.00	0	1	2

Tips: Up to 1000 products will be shown here.

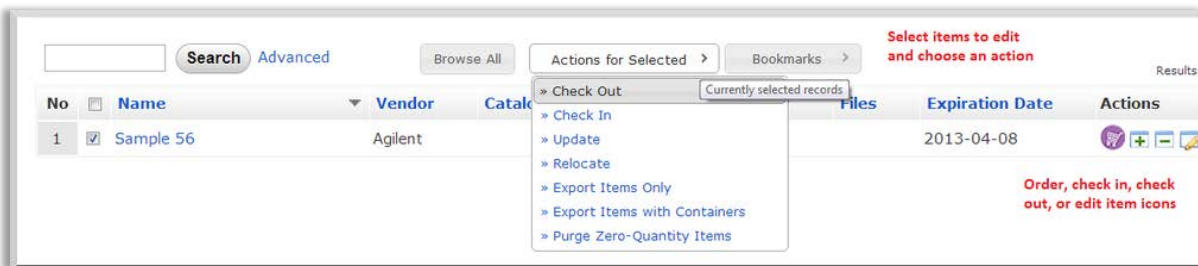
### 2.1.4: Expired Items

From the summary page, click the [Expired Items](#) link to view all items past expiration date. You may edit the items from this page.



### 2.1.5: Items Expiring in 14 days

From the summary page, click the [Expiring in 14 Days](#) link to view all items soon to expire. You may edit the items from this page.



## 2.2: Database Statistics

### 2.2.1: Funds

From the summary page, click the [Funds](#) link under [Database Statistics](#). From this link, you may review funds, edit, or delete.

The screenshot shows a web interface for managing funds. At the top, there is a search bar with 'Search' and 'Advanced' buttons, and a 'Browse All' button. To the right, there are buttons for 'Bookmarks' and 'Results 1 - 6 of 6 (page 1 of 1)'. Below this is a table with columns: No, Name, Amount, Amount Remaining, Start Date, End Date, Fund Source, Project Leader, Files, and Actions. The table contains six rows of fund data. At the bottom left, there is a red notification: 'review individual fund, edit, or delete'. At the bottom right, there is a red notification: 'Actions: Edit or Delete'.

No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						
2	Grant K21	200000	200000.00						
3	Grant R01	300000	300000.00						
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	NSF 01	100000	100000.00						
6	software	0	-359.00						

## 2.2.2: Vendors

From the summary page, click the **Vendors** link to view current vendors. You may update or delete vendors from this page, or view their website.

No	Name	Website	Full Name	Notes	Files	Actions
1	Affymetrix	http://www.affymetrix.com/				Update or delete icons
2	Agilent	http://www.agilent.com/				
3	BD Biosciences	http://www.bdbiosciences.com				
4	Bio-Rad	http://www.bio-rad.com/				
5	BioInfoRx	http://bioinfoRx.com/				
6	BioLegend	http://www.biolegend.com/				
7	Cell Signaling Technology	http://www.cellsignal.com/				

## 2.2.3: Products

From the summary page, click the **Products** link to view all current products in the database. You may order, update or delete products from this page.

No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
2	Reagent	AscI	NEB	Cat#1	0		0	Order, update, or delete
3	Reagent	BamHI	NEB	Cat#4	0		0	
4	Reagent	BglII	NEB	Cat#5	0		0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	
7	software	BxItems			359		3	
8	Lab Equipment	Centrifuge	VWR	E002	0		0	

## 2.2.4: Total Unique Items

Unique items are items that are different. Some items may be in a batch and share the same barcode. From the Summary Page, click the **Unique Items** link to view your total unique items and the quantity in each batch.

No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions	Container
1	AscI			Each	1		Order, Check In, check Out, or Edit	Temporary (1)
2	AscI			Each	1			Temporary (1)
3	BamHI			Each	1			Temporary (1)
4	BamHI			Each	1			Temporary (1)
5	BglII			Each	1			Temporary (1)
6	BglII			Each	1			Temporary (1)
7	Black Marker			Each	2			Temporary (2)
8	Black Marker			Each	2			Temporary (2)
9	BxItems				1			Box 1 (1)
10	BxItems				1			Box 1 (1)

### 2.2.5: Total Item Quantity

The total item quantity is the total number of items in inventory, including all batches.

### 2.2.6: Total Containers

To view all containers, click the **Total Containers** link under **Database Statistics**. Click on any container to view its subcontainers and/or stored items.

Search

Advanced

Browse All















Actions for Selected

Bookmarks >

Results 1 - 22 of 22 (page 1 of 1)

No	<input type="checkbox"/>	Name	Type	Rows	Cols	Capacity	Notes	
1	<input type="checkbox"/>	box 001	Container	10	10	0		
2	<input type="checkbox"/>	box 002	Container	10	10	0		
3	<input type="checkbox"/>	box 003	Container	10	10	0		
4	<input type="checkbox"/>	box 004	Container	10	10	0		
5	<input type="checkbox"/>	box 005	Container	10	10	0		
6	<input type="checkbox"/>	Box 1	Container	10	10	0		Items: 7
7	<input type="checkbox"/>	box 1	Container	10	10	0		Items: 1
8	<input type="checkbox"/>	Freezer 001	Container	1	1	50		
9	<input type="checkbox"/>	Freezer 002	Container	1	1	50		
10	<input type="checkbox"/>	Freezer 003	Container	1	1	50		
11	<input type="checkbox"/>	My Group Containers	SYSTEM_CONTAINER_GROUP	1	1	500		
12	<input type="checkbox"/>	rack 001	Container	1	1	50		
13	<input type="checkbox"/>	rack 002	Container	1	1	50		
14	<input type="checkbox"/>	rack 003	Container	1	1	50		
15	<input type="checkbox"/>	rack 004	Container	1	1	50		
16	<input type="checkbox"/>	Received From BxOrders	SYSTEM_CONTAINER_BXORDERS	1	1	500		

Click on any container to view its stored items

Stored Items (7)		List of Items Grid/Box Layout		Store or Re-arrange Items		View stored items in list or grid view	
For Selected Items: Add to Cart Check Out Relocate Update Delete Export							
No.	ID	Name	Vendor	Catalog	Unit Size		
1	 1000486	BxItems				A0: 1	
2	 1000487	BxItems				A0: 1	
3	 1000488	BxItems				A0: 1	
4	 1000489	Lab Bench	Neoclone	0009988		A0: 1	
5	 1000490	Lab Bench	Neoclone	0009988		A0: 1	
6	 1000513	sample 3	BioInfoRx		Each	A0: 1	
7	 1000514	Sample 4	Neoclone			A0: 1	

### 2.2.7: Total Grid/Boxes

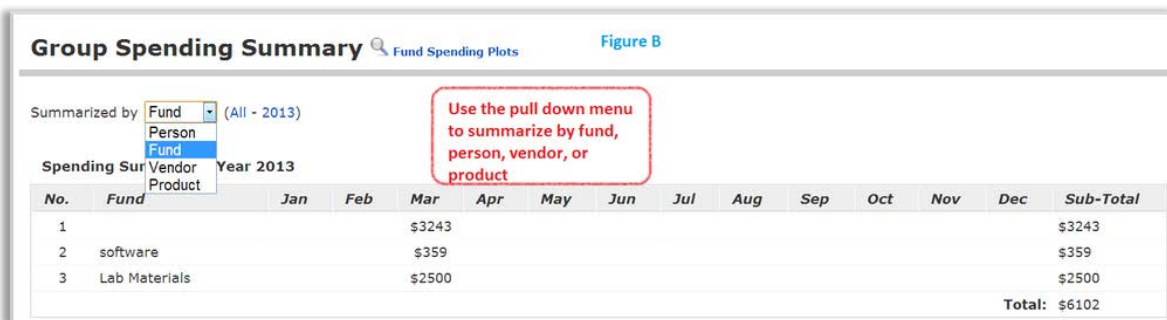
The **Total Grid/Boxes** in the Database Statistics represents how many storage boxes with grids are created in the system.

### 2.2.8: Regular Containers

The **Regular Containers** under Database Statistics indicate containers that do not have specified grids. The sum of Grid/Boxes and Regular containers should equal the number of total containers.

## 2.3: Group Spending Summary

The group spending summary is displayed on the summary page as well as the home page. **See Section 1.1** for more details.



## Section 3: Setting Up BxInventory

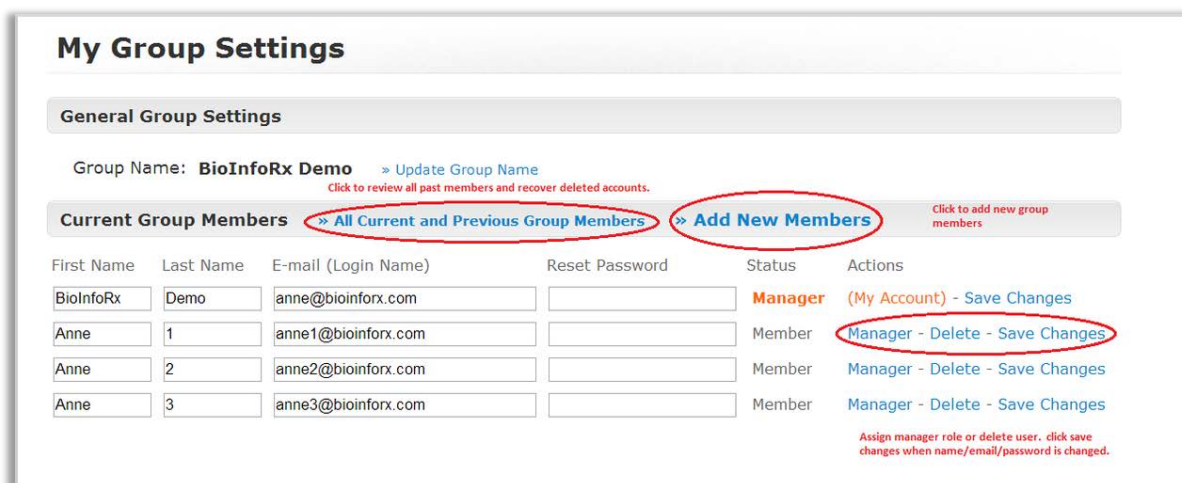
### 3.1: Add Group Members

BxInventory supports multiple users, with all data updated dynamically. Each group member can be logged in at any location, and added data will be updated in real time.

Click on the [Account Settings](#) tool in the top menu bar to add members.



Click [My Group Settings](#) to add and edit group members.

A screenshot of the 'My Group Settings' page. The page has a title 'My Group Settings' and a section 'General Group Settings' with 'Group Name: BioInfoRx Demo' and a link to 'Update Group Name'. Below this is a section 'Current Group Members' with two links: 'All Current and Previous Group Members' and 'Add New Members', both circled in red. There is also a link 'Click to add new group members'. A table lists group members with columns for First Name, Last Name, E-mail (Login Name), Reset Password, Status, and Actions. The first row shows 'BioInfoRx Demo' as the manager. The next three rows show members named 'Anne' with IDs 1, 2, and 3. The 'Actions' column for each member row contains the text 'Manager - Delete - Save Changes', which is circled in red for the first member. A note at the bottom right says 'Assign manager role or delete user. click save changes when name/email/password is changed.'

The group manager can edit, remove, or add group members at any time.

## 3.2: Set Up System

Click the [Settings](#) link in the navigation menu or from the home screen to set up your BxInventory system. This is not required if you wish to use the default settings. **Only Group Managers may set up the system.**

### 3.2.1: Set Up Ordering Procedures

Request and Receive are required/default settings. If you wish to add confirm, approve, and purchase, check the steps desired and save.

**Set up Order Processing Procedures**

- ☒ **Request** All group members can submit ordering requests. This step is required.
- ☐ **Confirm** If Confirm step is checked, all requests need to be confirmed by some one first.
- ☐ **Approve** If Approve step is checked, all requests need to be approved by some one before purchasing.
- ☐ **Purchase** If Purchase step is checked, all requested items need to be purchased before receiving.
- ☒ **Receive** All items have to be checked in before when received. This step is required.

Note: Next-step Managers can be defined with [Set up User Permissions](#) tool.

### 3.2.2: Set up BxOrders User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.

**Set up BxOrders User Permissions**

	Databases						Procedure Controls				
	Manage Vendors	Manage Fund	Manage Products	Manage Orders	Manage Requests	Submit Requests	Confirm Requests	Approve Requests	Purchase Items	Receive Items	
BioInfoRx Demo (Manager)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Anne G	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
AMG AMG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	



### 3.2.3: Set Up BxItems User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.

	Containers				Items					
	Add	Update	Delete	Relocate	Add	Update	Delete	Relocate	Check In	Check Out
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BioInfoRx Demo (Manager)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Anne G	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AMG AMG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

### 3.2.4: Set up Container fields

BxInventory contains 5 standard fields and 9 custom fields for containers. You may edit the standard fields, or add custom fields of your own. Uncheck categories you do not want to use, or check categories you want to use. Create a field caption, initial value (if applicable), and the style. To use and view the fields, check the appropriate boxes.

To add custom fields, type a field name and use the **dropdown** menu to create a field style.

You may add an Initial Value to any field if all items in that field will begin with the same prefix.

The **Container ID** is a system generated barcode number. Use the barcode field only if you wish to input your own barcodes.

In any setup field area, you can **drag a row** to rearrange fields. Simply click and hold on any field's gray bar and drag it to the desired location.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name	Drag and drop any field to a new location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu <span>Edit</span>
3. Barcode	Barcode	Uncheck fields you won't use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text <span>Edit dropdown menu</span>
4. Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
6. Custom Field1	Custom Field1	Add Custom fields and choose type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7. Custom Field2	Custom Field2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
8. Custom Field3	Custom Field3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
9. Custom Field4	Custom Field4		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
10. Custom Field5	Custom Field5		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text

Save



**Pull down menus** are set up by clicking the edit image next to dropdown menu. Add one field per line and save.

**Enter Value Options**

Enter one option per row:

- Container
- Building
- Room
- Freezer
- Rack
- Shelf
- Box
- Other

(Tip: Click the **Cancel** button to discard changes.)

Save Cancel

### 3.2.5: Set Up Item fields

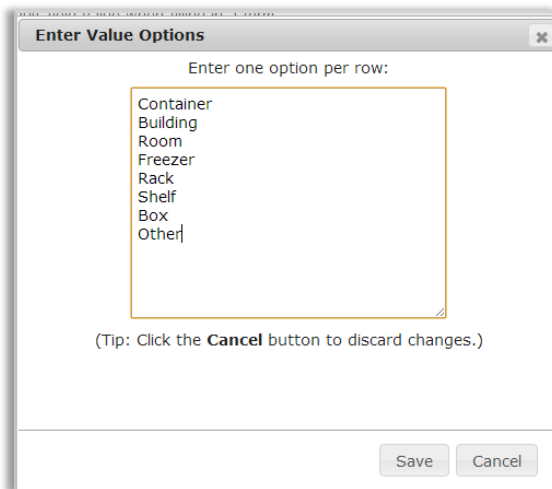
Bxitems contains 10 standard fields and 5 custom fields for items. Setup is the same as setting up containers. **Note that the Expiration Date field will trigger the expiration date reminders.**

**Set up Custom Fields - Items**

1. You can drag a row to re-order fields.  
 2. \* **View**: Default viewing fields when browsing all records, ignored if **Use** field is not checked.  
 3. \*\* **Use**: Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* **Initial Value**: Default field value when filling in a form.

	Fields	Field Captions	Initial Value***	Use**	View*	Style
1.	Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2.	Quantity	Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
3.	Vendor	Vendor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4.	Catalog	Catalog		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5.	Unit	Unit Size		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6.	Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7.	Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu
8.	Lot Number	Lot Number		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
9.	Expiration Date	Expiration Date	Use this field for expiration date reminders on the home page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
10.	Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
11.	Custom Field1	Minimum Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
12.	Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
13.	Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
14.	Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
15.	Custom Field5	Custom Field5		<input type="checkbox"/>	<input type="checkbox"/>	Short Text

To create or edit pull down menus, click on the image next to dropdown menu, and add fields one per line. These will appear in your new dropdown menu ( See section 3.2.4).



The dialog box titled "Enter Value Options" contains a text area with the following text:

```
Container
Building
Room
Freezer
Rack
Shelf
Box
Other|
```

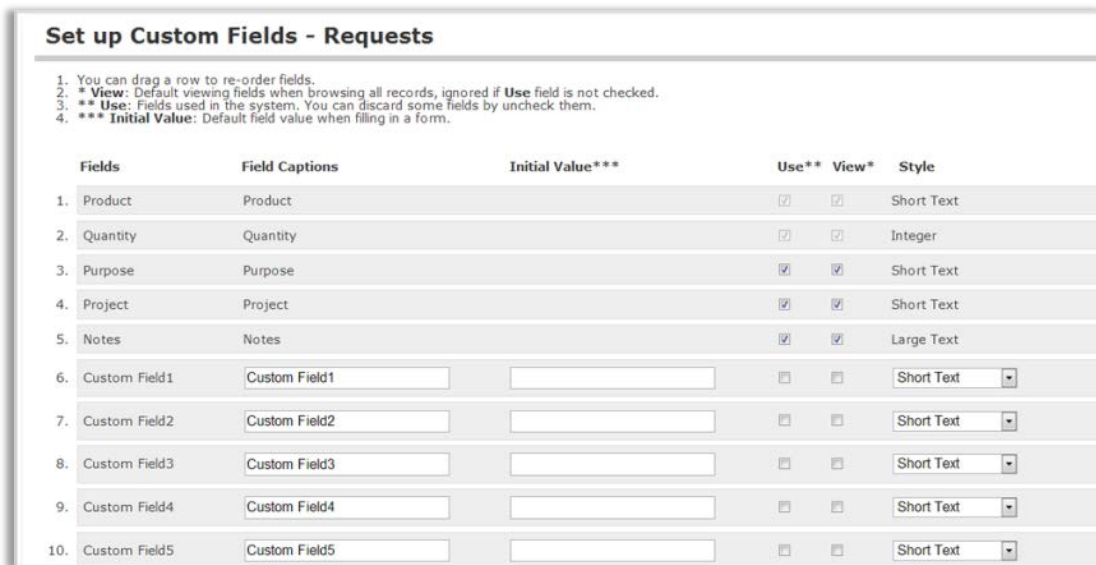
Below the text area is a tip: (Tip: Click the **Cancel** button to discard changes.)

At the bottom are "Save" and "Cancel" buttons.

### 3.2.6: Set up Request Fields

Requests contains 5 standard fields and 5 custom fields. Setup is the same as setting up container or item fields. Note that product and quantity are required fields.

Remember to **SUBMIT** in each setup area! Use the pull down menu to define the type of custom fields you are adding.



The form titled "Set up Custom Fields - Requests" includes instructions and a table for field configuration.

Instructions:

1. You can drag a row to re-order fields.
2. \* **View**: Default viewing fields when browsing all records, ignored if **Use** field is not checked.
3. \*\* **Use**: Fields used in the system. You can discard some fields by uncheck them.
4. \*\*\* **Initial Value**: Default field value when filling in a form.





Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Product	Product		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Quantity	Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
3. Purpose	Purpose		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4. Project	Project		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
6. Custom Field1	<input type="text" value="Custom Field1"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
7. Custom Field2	<input type="text" value="Custom Field2"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
8. Custom Field3	<input type="text" value="Custom Field3"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
9. Custom Field4	<input type="text" value="Custom Field4"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
10. Custom Field5	<input type="text" value="Custom Field5"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>

### 3.2.7: Setup Product Fields

**Products** contains 12 standard fields and 5 custom fields. Setup is the same as other field setups. Note that using the minimum/maximum quantity fields will trigger the low stock or overstock reminder on the settings page.

### Set up Custom Fields - Products

1. You can drag a row to re-order fields.  
 2. \* **View:** Default viewing fields when browsing all records, ignored if **Use** field is not checked.  
 3. \*\* **Use:** Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* **Initial Value:** Default field value when filling in a form.






	Fields	Field Captions	Initial Value***	Use**	View*	Style
1.	Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2.	Vendor	Vendor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
3.	Catalog	Catalog		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4.	Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
5.	Unit	Unit Size		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6.	Unit Price	Unit Price		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Decimal
7.	Minimum Quantity	Minimum Quantity	Use these fields to trigger overstock/low stock warnings on the home page	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
8.	Maximum Quantity	Maximum Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
9.	Safety Notes	Safety Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
10.	Storage Instruction	Storage Instruction		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
11.	Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
12.	Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
13.	Custom Field1	<input type="text" value="Custom Field1"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
14.	Custom Field2	<input type="text" value="Custom Field2"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
15.	Custom Field3	<input type="text" value="Custom Field3"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

### 3.2.8: Set Up Vendor Fields

**Vendors** contains 9 standard fields and 5 custom fields. Setup is the same as other field setups. Use the vendor website field to create direct links to the vendor website for online ordering.

### Set up Custom Fields - Vendors

1. You can drag a row to re-order fields.  
 2. \* **View:** Default viewing fields when browsing all records, ignored if **Use** field is not checked.  
 3. \*\* **Use:** Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* **Initial Value:** Default field value when filling in a form.

	Fields	Field Captions	Initial Value***	Use**	View*	Style
1.	Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2.	Category	Category		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
3.	Address	Address		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4.	Website	Website	Use this field to create a clickable website for online ordering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5.	Full Name	Full Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6.	Contact	Contact Person		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7.	Phone	Phone		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
8.	Email	E-mail		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
9.	Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
10.	Custom Field1	<input type="text" value="Custom Field1"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
11.	Custom Field2	<input type="text" value="Custom Field2"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
12.	Custom Field3	<input type="text" value="Custom Field3"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
13.	Custom Field4	<input type="text" value="Custom Field4"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

### 3.2.9: Set up Grants and Project Funds Fields

**Funding** contains 7 standard fields and 5 custom fields. Setup is the same as other field setups. The start date, end date, and funding amounts will help you to keep track of spending and budgets.

**Set up Custom Fields - Funding**

1. You can drag a row to re-order fields.

2. \* **View**: Default viewing fields when browsing all records, ignored if **Use** field is not checked.

3. \*\* **Use**: Fields used in the system. You can discard some fields by uncheck them.

4. \*\*\* **Initial Value**: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Amount	Amount		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Decimal
3. Start Date	Start Date		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
4. End Date	End Date		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
5. Fund Source	Fund Source		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6. Project Leader	Project Leader		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
8. Custom Field1	<input type="text" value="Custom Field1"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
9. Custom Field2	<input type="text" value="Custom Field2"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
10. Custom Field3	<input type="text" value="Custom Field3"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
11. Custom Field4	<input type="text" value="Custom Field4"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>
12. Custom Field5	<input type="text" value="Custom Field5"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <input type="button" value="v"/>

☐ Remove Saved Settings

## Section 4: Manage Purchase Orders



### 4.1: Vendors

#### 4.1.1: Add Vendors

To add vendors, choose the **Add Vendors** Link under Manage Purchase orders from the Home screen, or **Vendors: Add** from the left menu under the **Manage Orders** header.

To add vendors one at a time, fill in the fields and save. You may attach up to 3 files. The fields are created in your settings area (see section 3.2.8).

### Add a New Vendor

 Import Vendors  Search Vendors

*Tips: \* indicates required fields.*

\* Name:

Alpha Pharma

Category:

Company

Address:

15 Alpha Pharma Way

Website:

www.alphapharma.com

Full Name:

Alpha Pharma Pharmaceuticals

Contact Person:

John Green

Phone:

555-555-5555

E-mail:

john@alphapharma.com

Notes:

Choose File

No file chosen

Attach Files: 

Choose File

No file chosen

Choose File

No file chosen

Save

☒ Update record if name is already in the system

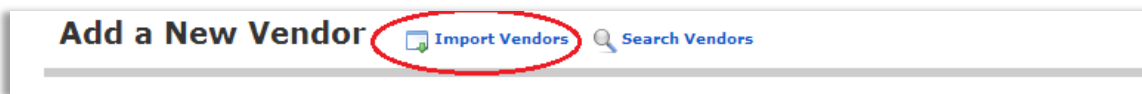
Dropdown menus are created in settings area

Attach up to 3 files per vendor for easy reference by multiple users

If vendor exists and you want to update, check this box

## 4.1.2: Import Vendors

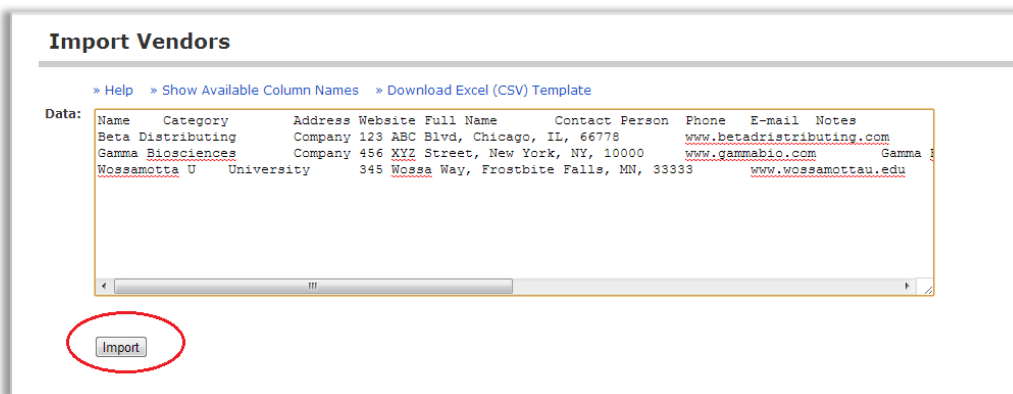
**Step 1:** To import several vendors to BxInventory at once, click **Import Vendors** from the **Add New Vendor** screen.



**Step 2:** Download the Excel Template to add your vendors. If you have several vendors already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is Vendor Name, other fields may be deleted or left blank if not needed. Add as many vendors to the spreadsheet as you wish. An example of the format is shown below.

	A	B	C	D	E	F	G	H	I
1	Name	Category	Address	Website	Full Name	Contact Person	Phone	E-mail	Notes
2	Beta Distributing	Company	123 ABC Blvd, Chicago, IL, 66778	www.betadistributing.com	Beta Distributing	Jane Smith	555-555-1234	jane@betadistributing.com	preferred
3	Gamma Biosciences	Company	456 XYZ Street, New York, NY, 10000	www.gammabio.com	Gamma Biosciences	Joe Black	555-123-4567	info@gammabio.com	
4	Wossamotta U	University	345 Wossa Way, Forstbite falls, MN, 33333	www.wossamottau.edu	University of Wossamata	Bullwinkle J. Moose	555-333-3333	bull@wossamottau.edu	Brrr!

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

The screenshot shows the 'Import Vendors' form. At the top, there are links: 'Help', 'Show Available Column Names', and 'Download Excel (CSV) Template'. Below these, there is a 'Data:' label followed by a text area containing the following text:

```
Name      Category    Address Website Full Name      Contact Person  Phone  E-mail  Notes
Beta Distributing    Company 123 ABC Blvd, Chicago, IL, 66778 www.betadistributing.com
Gamma Biosciences    Company 456 XYZ Street, New York, NY, 10000 www.gammabio.com Gamma
Wossamotta U          University 345 Wossa Way, Forstbite Falls, MN, 33333 www.wossamottau.edu
```

At the bottom of the form, there is an 'Import' button, which is circled in red.

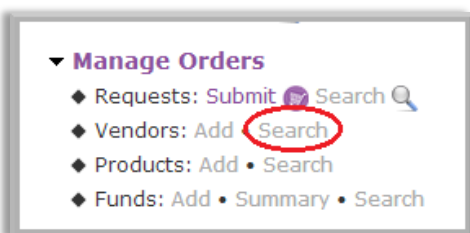
Step 4: Click Refresh when prompted, and you will be directed to the Vendor list. Your new vendors will appear in the list.

No	<input type="checkbox"/>	Name	Website	Full Name	Notes	Files	Actions
1	<input type="checkbox"/>	Affymetrix	http://www.affymetrix.com/				
2	<input type="checkbox"/>	Agilent	http://www.agilent.com/				
3	<input type="checkbox"/>	BD Biosciences	http://www.bdbiosciences.com				
4	<input type="checkbox"/>	Beta Distributing	www.betadistributing.com	Beta Distributing	preferred		
5	<input type="checkbox"/>	Bio-Rad	http://www.bio-rad.com/				
6	<input type="checkbox"/>	BioInfoRx	http://bioinforx.com/				
7	<input type="checkbox"/>	BioLegend	http://www.biolegend.com/				
8	<input type="checkbox"/>	Cell Signaling Technology	http://www.cellsignal.com/				
9	<input type="checkbox"/>	Clontech	http://www.clontech.com/				
10	<input type="checkbox"/>	Eppendorf	http://eshop.eppendorfna.com/				
11	<input type="checkbox"/>	Gamma Biosciences	www.gammabio.com	Gamma Biosciences			
12	<input type="checkbox"/>	Life Technologies	http://www.lifetechnologies.com				
13	<input type="checkbox"/>	Millipore	http://www.emdmillipore.com				
14	<input type="checkbox"/>	NEB	http://www.neb.com/				
15	<input type="checkbox"/>	Neoclone	http://www.neoclone.com				
16	<input type="checkbox"/>	Promega	http://www.promega.com/				
17	<input type="checkbox"/>	Qiagen	http://www.qiagen.com/				
18	<input type="checkbox"/>	Roche Applied Science	https://www.roche-applied-science.com/				
19	<input type="checkbox"/>	Santa Cruz Biotechnology	http://www.scbt.com/				
20	<input type="checkbox"/>	Sigma-Aldrich	http://www.sigmaaldrich.com				
21	<input type="checkbox"/>	Thermo Fisher	http://www.thermofisher.com				
22	<input type="checkbox"/>	USA Scientific	http://www.usascientific.com/				
23	<input type="checkbox"/>	VWR	https://us.vwr.com/store/				
24	<input type="checkbox"/>	Wossamotta U	www.wossamottau.edu	University of Wossamata	Brrr!		

### 4.1.3: Search, Review, and Edit Vendors

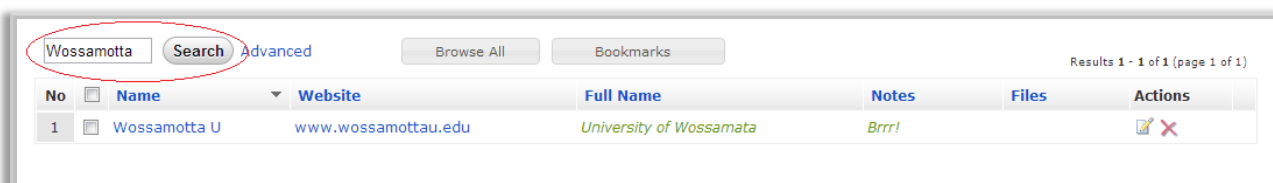
#### 4.1.3.1: Search Vendors

To search vendors, click **Vendors: Search** under Manage Orders.



#### 4.1.3.2: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.



#### 4.1.3.3: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

The screenshot shows a web application interface with a search bar containing 'Wossamotta'. The 'Advanced' link is circled in red. Below the search bar, a table lists search results with columns: No, Name, Website, Full Name, Notes, and Files. The first result is '1' with 'Wossamotta' in the Name column. A 'BxAF Search' dialog box is open, showing search criteria and field selection options. The dialog includes three search criteria rows, a 'Select Fields to Display' section with 'Available Fields' and 'Selected Fields' lists, 'Field Sorting Options', and 'Other Options' for 'Records Per Page'. The 'Search' button at the bottom right of the dialog is also circled in red.

Wossamotta Search **Advanced** Browse All Bookmarks Results 1

No	Name	Website	Full Name	Notes	Files
1	Wossamotta				

**BxAF Search**

1. (All Fields) contains Wossamotta AND OR  
2. (All Fields) does not contain AND OR  
3. (All Fields) = (number) AND OR

**Select Fields to Display:**

Available Fields	Selected Fields
Category Address Contact Person Phone E-mail	Name Website Full Name Notes Files

Tip: Hold Ctrl key to select multiple fields.  
Move available fields to selected fields box, or vice-versa. You may also re-order fields.

**Field Sorting Options:**  
1: Name Ascending Descending

**Other Options:**  
Records Per Page: 50

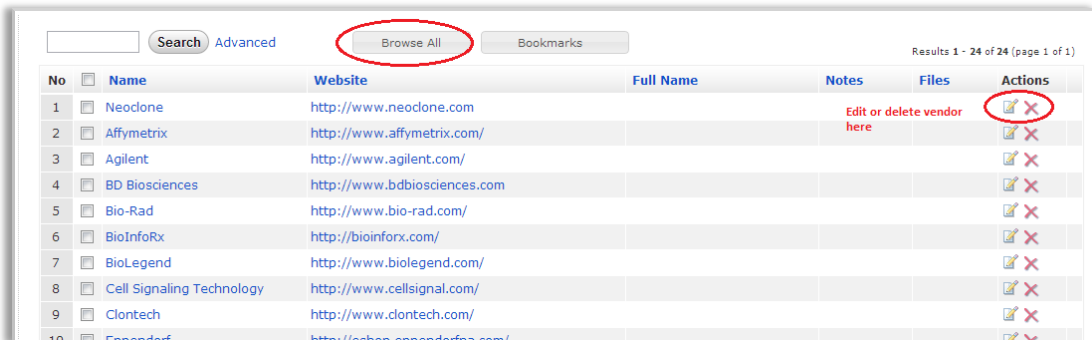
Search Cancel























#### 4.1.3.4: Edit Vendors

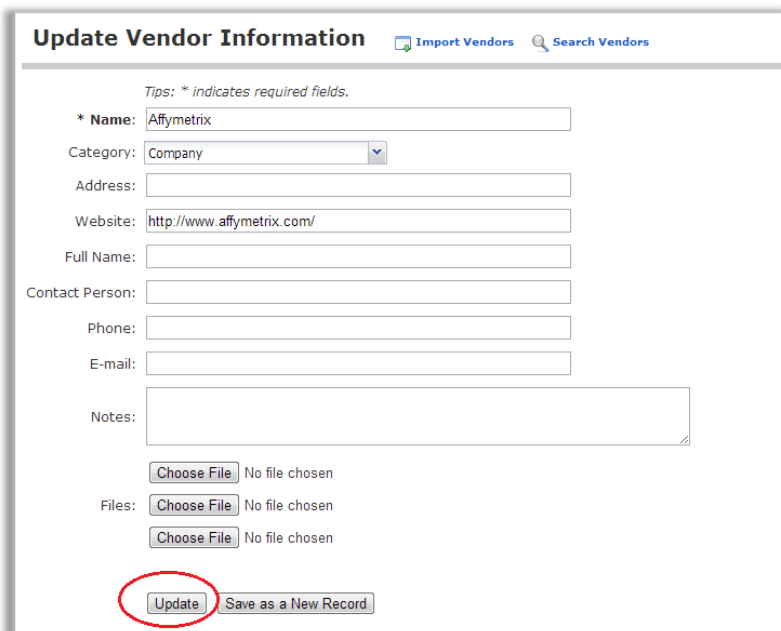
Vendor information may be updated at any time. From the **Search Vendors** Area, you may search a vendor or browse all and select from the list to update using the update icon. Vendors may also be deleted from this area.

**\*\* Clicking the red X will delete the vendor\*\***



No	Name	Website	Full Name	Notes	Files	Actions
1	Neoclone	http://www.neoclone.com				 
2	Affymetrix	http://www.affymetrix.com/				 
3	Agilent	http://www.agilent.com/				 
4	BD Biosciences	http://www.bdbiosciences.com				 
5	Bio-Rad	http://www.bio-rad.com/				 
6	BioInfoRx	http://bioinforma.com/				 
7	BioLegend	http://www.biolegend.com/				 
8	Cell Signaling Technology	http://www.cellsignal.com/				 
9	Clontech	http://www.clontech.com/				 
10	Esperdef	http://esperdef.com/				 

Click the pencil icon to edit the vendor and update.



**Update Vendor Information** [Import Vendors](#) [Search Vendors](#)

*Tips: \* indicates required fields.*

\* **Name:**

**Category:**

**Address:**

**Website:**

**Full Name:**

**Contact Person:**

**Phone:**

**E-mail:**

**Notes:**

No file chosen

**Files:**  No file chosen

No file chosen

#### 4.1.3.5: Create a New Vendor by Updating an Existing Similar Vendor

Quickly and easily create new vendors by updating an existing vendor with similar attributes. Save as a new record, and BxInventory will create a new vendor while maintaining the existing record.

**Update Vendor Information** [Import Vendors](#) [Search Vendors](#)

*Tips: \* indicates required fields.*

\* **Name:**

**Category:**

**Address:**

**Website:**

**Full Name:**

**Contact Person:**

**Phone:**

**E-mail:**

**Notes:**

No file chosen

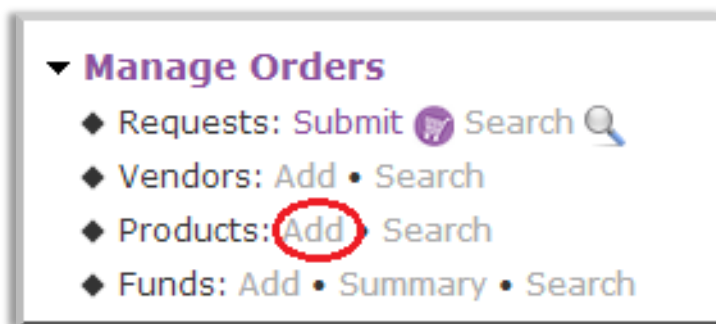
**Files:**  No file chosen

No file chosen

## 4.2: Products

### 4.2.1: Add Products

To add new products, click the [Add Products](#) link on the home page or in the sidebar menu.



Fill in required fields with \*, all other fields are optional. Use the Vendor pull down menu, or type in a vendor name to add one. You may also attach files related to the product.

## Add a New Product

 [Import Products](#)  [Search Products](#)

*Tips: \* indicates required fields.*

\* **Vendor:**

☒ Add one if not exist.

[» Add Vendors](#)

\* **Name:**

Catalog:

Type:

Unit Size:

Unit Price:

Minimum Quantity:

Maximum Quantity:

Safety Notes:

Storage Instruction:

Description:

Notes:

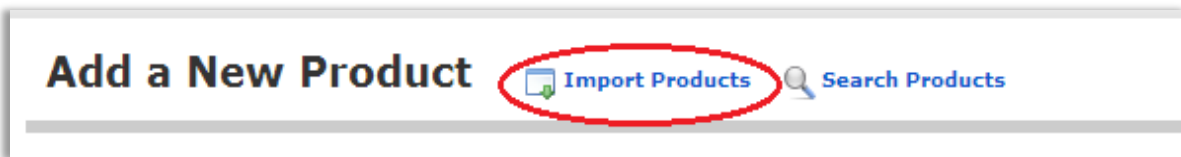
hazardous...tsheet.pdf

Attach Files:  No file chosen

No file chosen

## 4.2.2: Import Products

**Step 1:** From the [Add a New Product](#) Page, select **Import Products**.



**Step 2:** Download the Excel Template to add your products. If you have several products already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.

A	B	C	D	E	F	G	H	I	J	K	L
Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description		
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples		
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials		
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents		
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red		

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

The screenshot shows the 'Import Products' form. At the top, there are links: '» Help', '» Show Available Column Names', and '» Excel Template'. Below these, the 'Data:' section contains a table with the same data as the previous table. At the bottom left, the 'Import' button is circled in red.

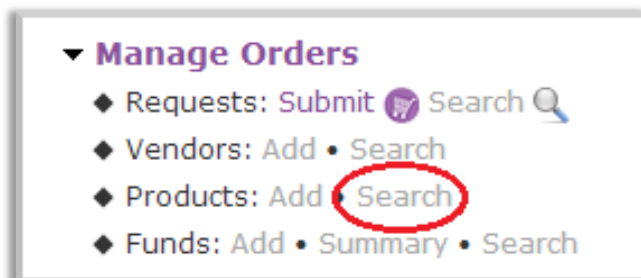
Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile
Dryz	NEB	R01010	Reagent	35	1	5	None
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None

**Step 4:** Click Refresh when prompted and you will be directed to the Product list. Your new products will appear in the list.

		Search Advanced		Browse All		Actions for Selected		Bookmarks	
No	<input type="checkbox"/>	Type	Name	Vendor	Catalog	Unit Price	Description		
1	<input type="checkbox"/>	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit		
2	<input type="checkbox"/>	Reagent	AscI	NEB	Cat#1	0			
3	<input type="checkbox"/>	Reagent	BamHI	NEB	Cat#4	0			
4	<input type="checkbox"/>	Reagent	BglII	NEB	Cat#5	0			
5	<input type="checkbox"/>	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers		
6	<input type="checkbox"/>	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System		
7	<input type="checkbox"/>	software	BxItems			359			
8	<input type="checkbox"/>	Lab Equipment	Centrifuge	VWR	E002	0			
9	<input type="checkbox"/>	Reagent	ClaI	NEB	Cat#7	0			
10	<input type="checkbox"/>	Office Supplies	Copy Paper	Thermo Fisher	V012	0			
11	<input type="checkbox"/>	Reagent	DpnI	NEB	Cat#8	0			
12	<input type="checkbox"/>	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red		
13	<input type="checkbox"/>	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents		
14	<input type="checkbox"/>	Reagent	EcoRI	NEB	R0101L	0			
15	<input type="checkbox"/>	Office Supplies	Folders	Thermo Fisher	V001	0			
16	<input type="checkbox"/>	Equipment	Lab Bench	Neoclone	0009988	2500			
17	<input type="checkbox"/>	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove		
18	<input type="checkbox"/>	Lab Equipment	Microscope	VWR	E001	0			
19	<input type="checkbox"/>	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System		
20	<input type="checkbox"/>	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples		
21	<input type="checkbox"/>	Reagent	pBR322	Life Technologies	Plasmid01	0			

#### 4.2.3: Search, Review, and Edit Products

To search products, click **Products: Search** under **Manage Orders** in the Left Sidebar.



#### 4.2.3.1: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.

The screenshot shows a web application interface for searching reagents. At the top, there is a search bar with the text 'Reagent' entered and a 'Search' button next to it. Below the search bar, there are buttons for 'Browse All', 'Actions for Selected', and 'Bookmarks'. The main area displays a table of search results. The table has columns for 'No', 'Type', 'Name', 'Vendor', 'Catalog', 'Unit Price', 'Description', 'Quantity', and 'Actions'. The results show 15 items, all of which are 'Reagent' type. The first few items are 'ANTI-FLAG antibody', 'Ascl', 'BamHI', 'BglII', 'ClaI', 'DpnI', 'Dryz', 'EcoRI', 'pBR322', 'pET21-a', 'pEXP5-CT', 'SacII', 'Sodium chloride', 'ThermoPol Buffer', and 'XmaI'. The 'Actions' column for each item contains three icons: a magnifying glass, a document, and a cross.

No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG antibody produced in rabbit	0	
2	Reagent	Ascl	NEB	Cat#1	0		0	
3	Reagent	BamHI	NEB	Cat#4	0		0	
4	Reagent	BglII	NEB	Cat#5	0		0	
5	Reagent	ClaI	NEB	Cat#7	0		0	
6	Reagent	DpnI	NEB	Cat#8	0		0	
7	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	
8	Reagent	EcoRI	NEB	R0101L	0		0	
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0	
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0	
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	
12	Reagent	SacII	NEB	Cat#9	0		0	
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol Reaction Buffer	0	
15	Reagent	XmaI	NEB	Cat#10	0		0	

#### 4.2.3.2: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

The screenshot shows the 'BxAF Search' dialog box. It has three search criteria sections. The first section has a dropdown menu set to '(All Fields)', a search operator set to 'contains', and a search term 'Reagent'. The second and third sections have dropdown menus set to '(All Fields)' and search operators set to 'equals to'. Below these sections, there is a red text prompt: 'Use pull down menus to narrow your search'. Underneath, there is a section titled 'Select Fields to Display:'. This section has two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' column lists 'Unit Size', 'Minimum Quantity', 'Maximum Quantity', 'Safety Notes', 'Storage Instruction', and 'Notes'. The 'Selected Fields' column lists 'Type', 'Name', 'Vendor', 'Catalog', 'Unit Price', and 'Description'. There are buttons for moving fields between the two columns: '>>' and '<<' between the columns, and 'All >>' and 'All <<' at the bottom of each column. A red circle highlights the '>>' button, and another red circle highlights the 'All <<' button. Below the 'Selected Fields' column, there is a red circle around a button with an upward arrow. A red text prompt 'Move fields across or up and down' is located below the 'Selected Fields' column. Below the 'Select Fields to Display' section, there is a 'Field Sorting Options' section with a dropdown menu set to 'Name' and radio buttons for 'Ascending' (selected) and 'Descending'. Below this, there is an 'Other Options' section with a 'Records Per Page' dropdown menu set to '50'. At the bottom right, there is a 'Search' button and a 'Cancel' button. A red circle highlights the 'Search' button.

1. (All Fields) contains Reagent AND OR

2. (All Fields) equals to AND OR

3. (All Fields) equals to

Use pull down menus to narrow your search

Select Fields to Display:

Available Fields

Unit Size

Minimum Quantity

Maximum Quantity

Safety Notes

Storage Instruction

Notes

Selected Fields

Type

Name

Vendor

Catalog

Unit Price

Description

Tip: Hold Ctrl key to select multiple fields.

Field Sorting Options:

1: Name Ascending Descending

Other Options:































Records Per Page: 50

Search Cancel

#### 4.2.3.3: Edit Products

Vendor information may be updated at any time. From the [Search Products](#) Area, you may search a product or browse all and select from the list to update using the update icon. Products may also be deleted from this area.

**\*\* Clicking the red X will delete the vendor\*\***

Search Advanced Browse All Actions for Selected Bookmarks Results 1 - 15 of 15 (page 1 of 1)									
No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions	
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	order, edit, or delete	 
2	Reagent	AscI	NEB	Cat#1	0		0		 
3	Reagent	BamHI	NEB	Cat#4	0		0		 
4	Reagent	BglII	NEB	Cat#5	0		0		 
5	Reagent	ClaI	NEB	Cat#7	0		0		 
6	Reagent	DpnI	NEB	Cat#8	0		0		 
7	Reagent	Dryz	NEB	R01010	.35	Time Sensitive Reagents	0		 
8	Reagent	EcoRI	NEB	R0101L	0		0		 
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0		 
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0		 
11	Reagent	pEXP3-CT	Life Technologies	Plasmid03	0		0		 
12	Reagent	SacII	NEB	Cat#9	0		0		 
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0		 
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0		 
15	Reagent	XmaI	NEB	Cat#10	0		0		 

Click the pencil icon to edit the product and update.

**Update Product Information** [Import Products](#) [Search Products](#)

*Tips: \* indicates required fields.*

\* **Vendor:**  ☒ Add one if not exist

\* **Name:**

**Catalog:**

**Type:**

**Unit Size:**

**Unit Price:**

**Minimum Quantity:**

**Maximum Quantity:**

**Safety Notes:**

**Storage Instruction:**

**Description:**

**Notes:**

No file chosen

**Files:**  No file chosen

No file chosen

#### 4.2.3.4: Create a New Product by Updating an Existing Similar Product

Quickly and easily create new products by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new product record while maintaining the existing record.

**Update Product Information** [Import Products](#) [Search Products](#)

*Tips: \* indicates required fields.*

\* **Vendor:**  ☒ Add one if not exist

\* **Name:**

Catalog:

Type:

Unit Size:

Unit Price:

Minimum Quantity:

Maximum Quantity:

Safety Notes:

Storage Instruction:

Description:

Notes:

No file chosen

Files:  No file chosen

No file chosen

#### 4.2.3.5: Order More Products

To order more existing products, use the [Search Products](#) tool to search for products to re-order. Click on the Shopping Cart icon to order.

Results 1 - 15 of 15 (page 1 of 1)

No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	<input type="checkbox"/> Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	<input type="button" value="order, edit, or delete"/> <input type="button" value="shopping cart"/> <input type="button" value="delete"/>
2	<input type="checkbox"/> Reagent	AscI	NEB	Cat#1	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
3	<input type="checkbox"/> Reagent	BamHI	NEB	Cat#4	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
4	<input type="checkbox"/> Reagent	BglII	NEB	Cat#5	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
5	<input type="checkbox"/> Reagent	ClaI	NEB	Cat#7	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
6	<input type="checkbox"/> Reagent	DpnI	NEB	Cat#8	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
7	<input type="checkbox"/> Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
8	<input type="checkbox"/> Reagent	EcoRI	NEB	R0101L	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
9	<input type="checkbox"/> Reagent	pBR322	Life Technologies	Plasmid01	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
10	<input type="checkbox"/> Reagent	pET21-a	Life Technologies	Plasmid02	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
11	<input type="checkbox"/> Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
12	<input type="checkbox"/> Reagent	SacII	NEB	Cat#9	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
13	<input type="checkbox"/> Reagent	Sodium chloride	Sigma-Aldrich	51679-500G	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
14	<input type="checkbox"/> Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>
15	<input type="checkbox"/> Reagent	XmaI	NEB	Cat#10	0		0	<input type="button" value="shopping cart"/> <input type="button" value="delete"/>



## Submit Purchasing Requests [Search Products to Order](#)

*Tips: \* indicates required fields.*

Type:

Vendor:

\* Product:  [Check Details](#)

Can't find the right product? [Add One Now](#) or [Search Database](#)

New Price:

\* Quantity:

Fund:

☒ Add one if not exist

Purpose:

Project:

Notes:

No file chosen

Attach Files:  No file chosen

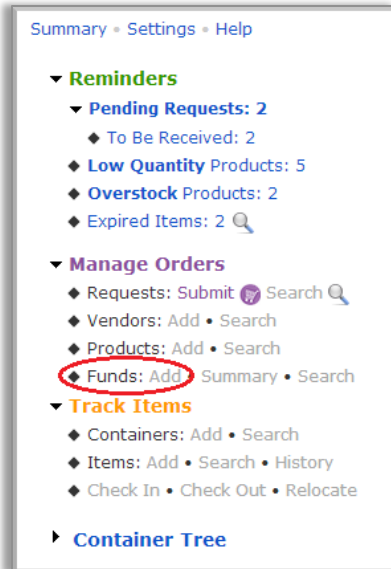
No file chosen

☐ I have verified my request information

## 4.3: Funds

### 4.3.1: Add Funds

To add new funds, click the [Add Funds](#) link on the home page or in the sidebar menu.



Fill in required fields with \*, all other fields are optional. You may also attach files related to the fund.

**Add a New Fund** [Import Funds](#) [Search Funds](#)

*Tips: \* indicates required fields.*

\* **Name:**

Amount:

Start Date:

End Date:

Fund Source:

Project Leader:

Notes:

No file chosen

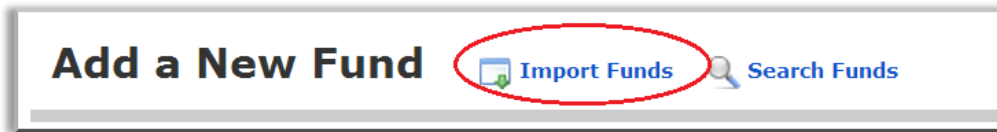
Attach Files:  No file chosen

No file chosen

☒ Update existing record if **Name** is already in the system

### 4.3.2: Import Funds

**Step 1:** From the [Add a New Fund](#) Page, select [Import Funds](#).



**Step 2:** Download the Excel Template to add your funds. If you have several funds already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is the fund name; other fields may be deleted or left blank if not needed. Add as many funds to the spreadsheet as you wish. An example of the format is shown below.

A	B	C	D	E	F	
Name	Amount	Start Date	End Date	Fund Source	Project Leader	
Postdoc Salaries	500000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith	
Office supplies	5000	1/1/2013	12/31/2013	Department Budget	Dr. Smith	
Reagents	15000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith	
lab Supplies	10000	1/1/2013	12/31/2013	Department Budget	Dr. Smith	

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

**Import Funds**

[» Help](#) [» Show Available Column Names](#) [» Excel Template](#)

**Data:**

Name	Amount	Start Date	End Date	Fund Source	Project Leader
Postdoc Salaries	500000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
Office supplies	5000	1/1/2013	12/31/2013	Department Budget	Dr. Smith
Reagents	15000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
lab Supplies	10000	1/1/2013	12/31/2013	Department Budget	Dr. Smith

**Step 4:** Click Refresh when prompted and you will be directed to the funds list. Your new funds will appear in the list.

Search

Advanced

Browse All

Bookmarks

Results 1 - 10 of 10 (page 1 of 1)

No	<input type="checkbox"/> Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	<input type="checkbox"/> Gates Foundation 01	500000	500000.00						
2	<input type="checkbox"/> Grant K21	200000	200000.00						
3	<input type="checkbox"/> Grant R01	300000	300000.00						
4	<input type="checkbox"/> Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	<input type="checkbox"/> lab Supplies	10000	10000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
6	<input type="checkbox"/> NSF 01	100000	100000.00						
7	<input type="checkbox"/> Office supplies	5000	5000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
8	<input type="checkbox"/> Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
9	<input type="checkbox"/> Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
10	<input type="checkbox"/> software	0	-359.00						

### 4.3.3: Search, Review, and Edit Funds

To search products, click **Funds: Search** under **Manage Orders** in the Left Sidebar.

**Manage Orders**

- Requests: Submit Search
- Vendors: Add • Search
- Products: Add • Search
- Funds: Add • Summary • **Search**

#### 4.3.3.1: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.

Search

Advanced

Browse All

Bookmarks

No	<input type="checkbox"/>	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader
1	<input type="checkbox"/>	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith
2	<input type="checkbox"/>	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith

#### 4.3.3.2: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

**BxAF Search**

1. (All Fields) contains NIH ☐ AND ☒ OR

2. (All Fields) equals to ☐ AND ☐ OR

3. (All Fields) equals to

**select Fields to Display**

**Available Fields**

Notes

**Selected Fields**

Name  
Amount  
Amount Remaining  
Start Date  
End Date  
Fund Source

Tip: Hold Ctrl key to select multiple fields.

**Field Sorting Options:**

1: Name ☐ Ascending ☐ Descending

**Other Options:**

Records Per Page: 50

Search Cancel

#### 4.3.3.3: Edit Funds

Fund information may be updated at any time. From the **Search Funds** Area, you may search a fund or browse all and select from the list to update using the update icon. Funds may also be deleted from this area.

**\*\* Clicking the red X will delete the vendor\*\***

No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						
2	Grant K21	200000	200000.00						
3	Grant R01	300000	300000.00						
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	lab Supplies	10000	10000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
6	NSF 01	100000	100000.00						
7	Office supplies	5000	5000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
8	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
9	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
10	software	0	-359.00						

Click the pencil icon to edit the fund and update.

#### 4.3.3.4: Create a New Fund by Updating an Existing Similar Fund

Quickly and easily create new funds by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new funding record while maintaining the existing record.

**Update Fund Information** [Import Funds](#) [Search Funds](#)

*Tips: \* indicates required fields.*

**\* Name:**

Amount:

Start Date:

End Date:

Fund Source:

Project Leader:

Notes:

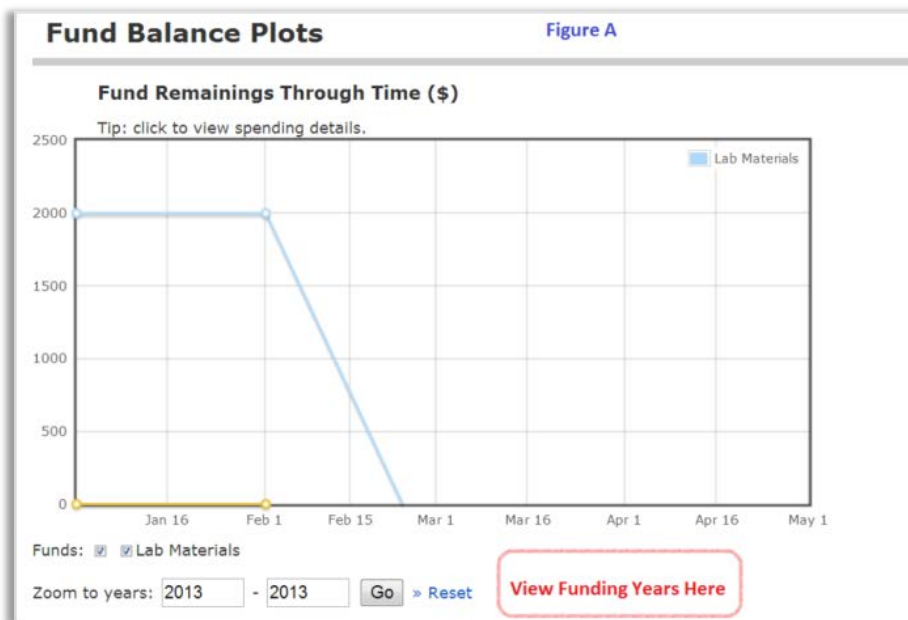
No file chosen

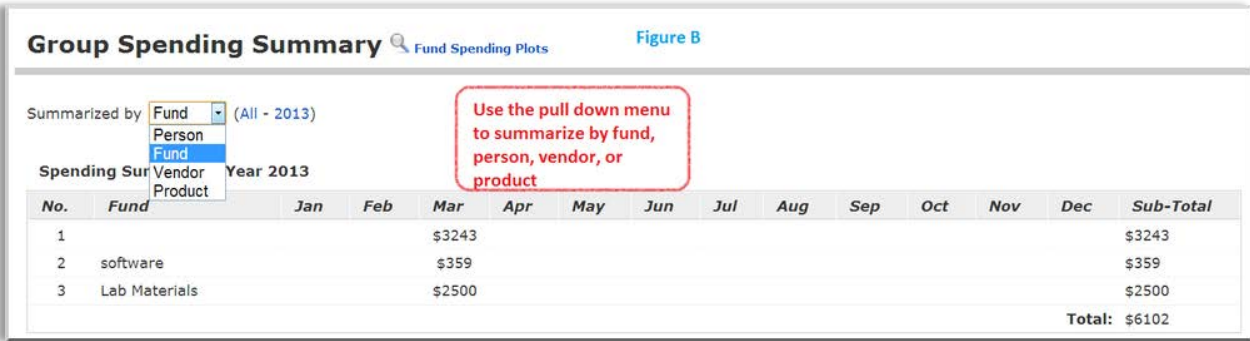
Files:  No file chosen

No file chosen

#### 4.3.4: Funds Summary

The funds summary displays fund balance plots and group spending summaries. The group spending summary may be categorized by fund, person, vendor, or product.

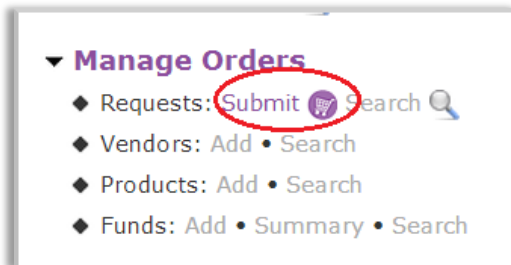




## 4.4: Purchase Requests

### 4.4.1: Submit Purchasing Requests

To place orders and submit purchasing requests, click the [Submit Purchase Requests](#) Link on the [Home Page](#) or in the sidebar menu.



Enter request information. Product name and quantity are required fields. If you select a fund, BxInventory will keep track of your budget for you. You may also add a fund here if needed.

**Submit Purchasing Requests** [Search Products to Order](#)

*Tips: \* indicates required fields.*

Type: Reagent

Vendor: Life Technologies

\* Product: 22: pET21-a, Life Technologies, Plasmid02, \$0.00 (Each) [Check Details](#)

can't find the right product? [Add One Now](#) or [Search Database](#)

New Price: 50.00

\* Quantity: 15

Fund: Reagents Add one if not exist

Purpose:

Project:

Notes:

Choose File No file chosen

Attach Files: Choose File No file chosen

Choose File No file chosen

☒ I have verified my request information

Submit Request




Verify your request information and submit request. Your request will appear in **Reminders: Pending Requests** in the left sidebar menu.



#### 4.4.3: Process Order Requests

To process requests, check desired orders, select **To Be Received**. Set status to received, rejected, or cancelled (received products will automatically appear in your inventory in a container). Check off received products. Requests may also be edited in this area.

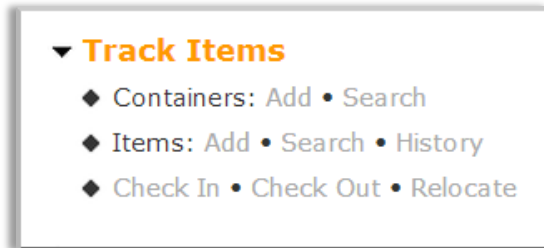
A screenshot of a web application interface titled 'Check off Received Products' with a search icon and 'Search Requests' text. Below the title is a button 'Check off Received Products' and a dropdown menu 'Set All Status To: Received' which is circled in red. The main part of the interface is a table with columns: Batch #, Date, Person, Product, Vendor, Catalog, Fund, Price, Quantity, Notes, and Edit. The table contains three rows of data. The first row has a red note 'Select items to check off' and an 'Edit' icon circled in red. Below the table are checkboxes for 'Select batches' (10002, 10003, 10004) and 'Select vendors' (Life Technologies). At the bottom is a button 'Check off Received Products' circled in red.

Batch #	Date	Person	Product	Vendor	Catalog	Fund	Price	Quantity	Notes	Edit
10002	2013-04-04	Demo, BioInfoRx	Lab Bench		0009988	Lab Materials	2500.00	9		
10003	2013-04-17	Demo, BioInfoRx	Ascl	NEB	Cat#1	Gates Foundation 01	3.00	3		
10004	2013-04-18	Demo, BioInfoRx	pET21-a	Life Technologies	Plasmid02	Reagents	50.00	15		



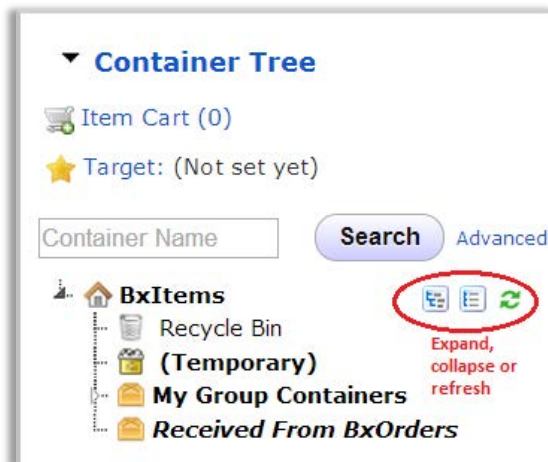
## Section 5: Track Item Storage Information

To begin tracking inventory, use the [Track Item Storage](#) Information area from the Home page or the left sidebar menu.



### 5.1: Containers

The container tree, by default, will display a [Recycle Bin](#) (for deleted items), a [Temporary Container](#) (for unstored items), [My Group Containers](#) (top tier of the tree), and [Received From BxOrders](#) (products received).

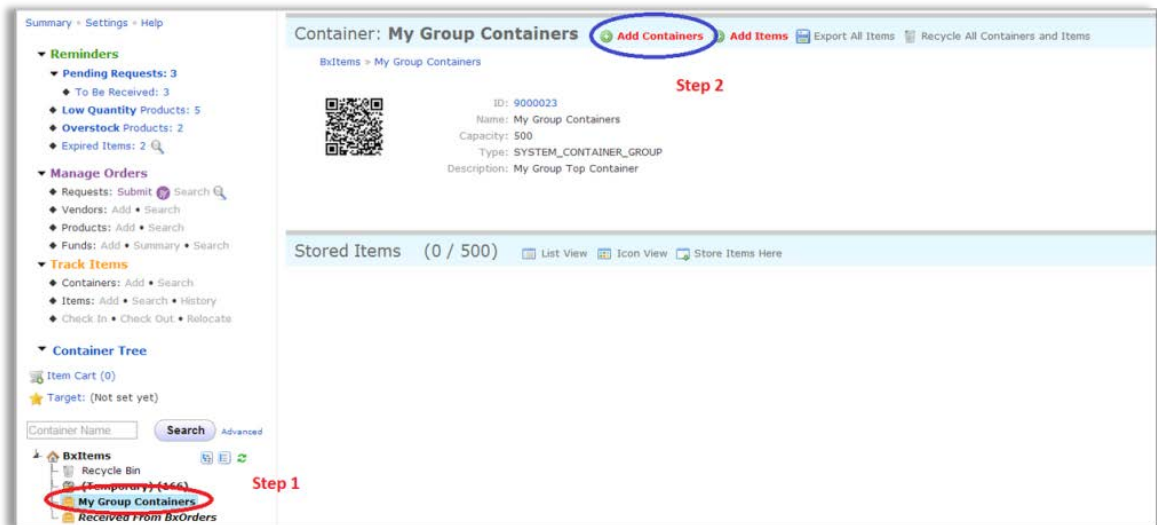


### 5.1.1: Add Containers

The container tree will display storage areas from largest to smallest. The example below demonstrates Room, Freezer, Shelf, Racks, and finally Boxes with grids for storage.

#### Tier 1: Rooms

Select **My Group Containers** for the highest level and click **Add Containers**.



Fill in container information and submit. You may add one room, or a series of rooms. You may attach files to all containers. Photos will appear in your container summary.

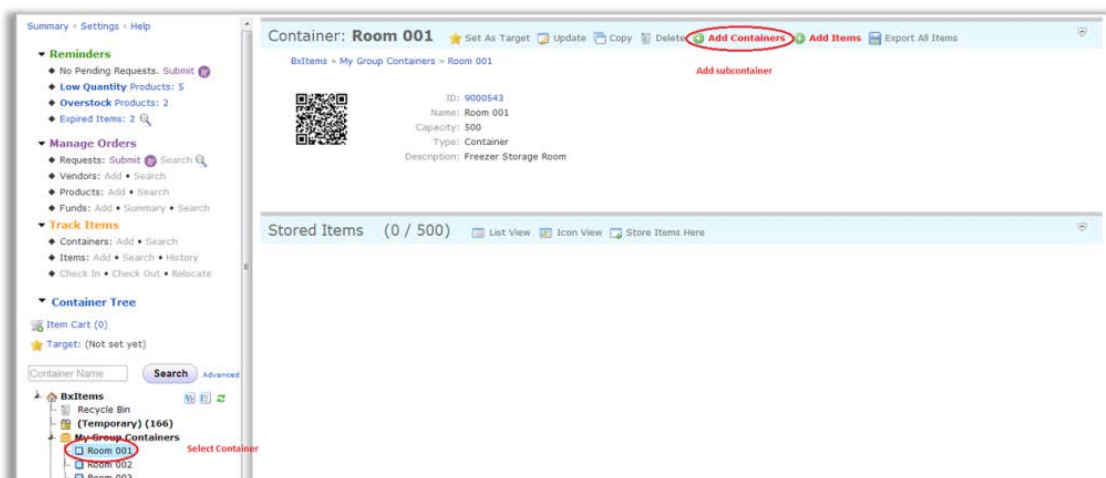
The 'Add Containers' form is shown with the following fields and options:

- Radio buttons for container type: ☐ Single container, ☒ Series of containers (circled in red), ☐ Grid/Box, ☐ Series of Grid/Box.
- Number of Containers: 3 (circled in red).
- Container Prefix: Room
- Container Capacity: 500 (with a note: ("0" to disable storing items. Maximum: 500))
- Type: Room (dropdown menu)
- Description: Freezer Storage Room
- Notes: (text area)
- Choose File: No file chosen
- Attach Files: Choose File No file chosen
- Choose File: No file chosen
- Submit button

A red text note on the right side of the form states: "Select series of containers to add several of the same type of containers at once."

## Tier 2: Freezers in a Room

From the container tree, select the room to add freezers to, and click **Add Containers**.



Fill in container information. You may add one freezer, or a series of freezers. Attach an image file if desired.

**Add Containers** [Import Containers](#) [Search Containers](#)

☐ Single container ☒ Series of containers ☐ Grid/Box ☐ Series of Grid/Box

Number of Containers:

Container Prefix:  **Add a prefix to number Freezers**

Container Capacity:  ("0" to disable storing items. Maximum: 500)

Type:

Description:

Notes:

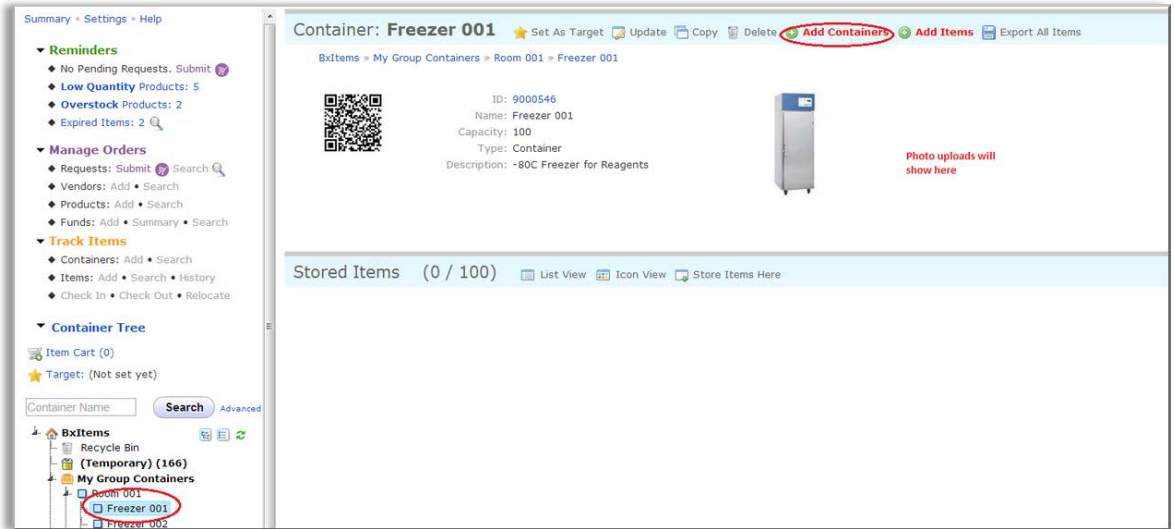
freezer.jpg **Attach an image file to display photo of freezer in container view**

Attach Files:  No file chosen

No file chosen

### Tier 3: Shelves in the Freezer

Select the freezer to add shelves to, and click **Add Containers**.



Fill in container information. You may add one shelf, or a series of shelves.

**Add Containers** Import Containers Search Containers

☐ Single container ☒ **Series of containers** ☐ Grid/Box ☐ Series of Grid/Box

Number of Containers: 4

Container Prefix: Shelf

Container Capacity: 50 ("0" to disable storing items. Maximum: 500)

Type: Shelf

Description:

Notes: Each Shelf holds 3 racks

Choose File shelf.jpg

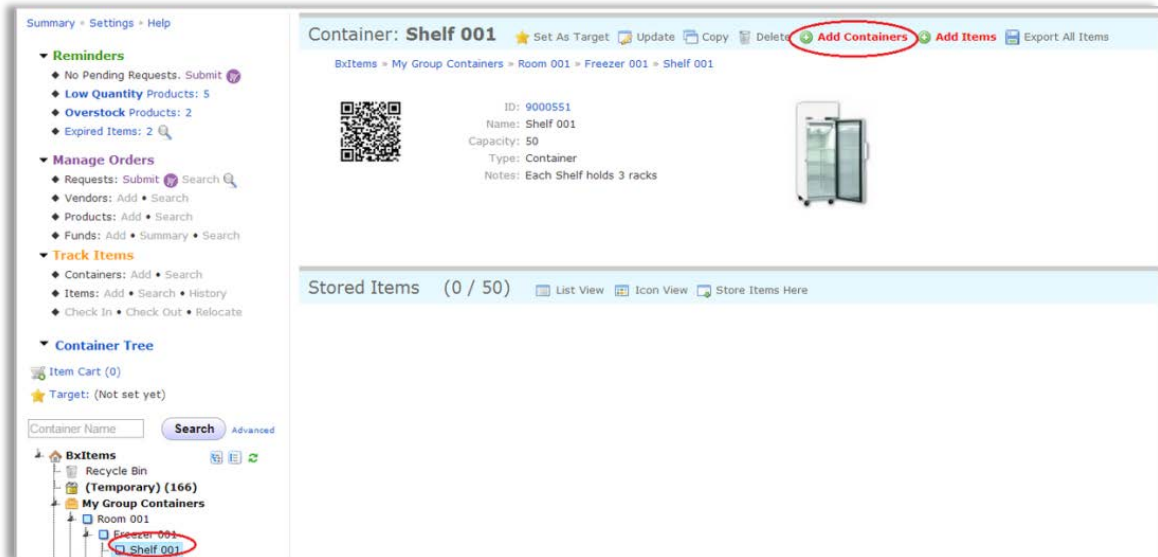
Attach Files: Choose File No file chosen

Choose File No file chosen

**Submit**

#### Tier 4: Racks on a Shelf

Click on the shelf you would like to add racksto, and select **Add Containers**.



Fill in container information. You may add one rack, or a series of racks. Upload a file if desired.

**Add Containers** [Import Containers](#) [Search Containers](#)

☐ Single container ☒ Series of containers ☐ Grid/Box ☐ Series of Grid/Box

Number of Containers:

Container Prefix:

Container Capacity:  ("0" to disable storing items. Maximum: 500)

Type:

Description:

Notes:

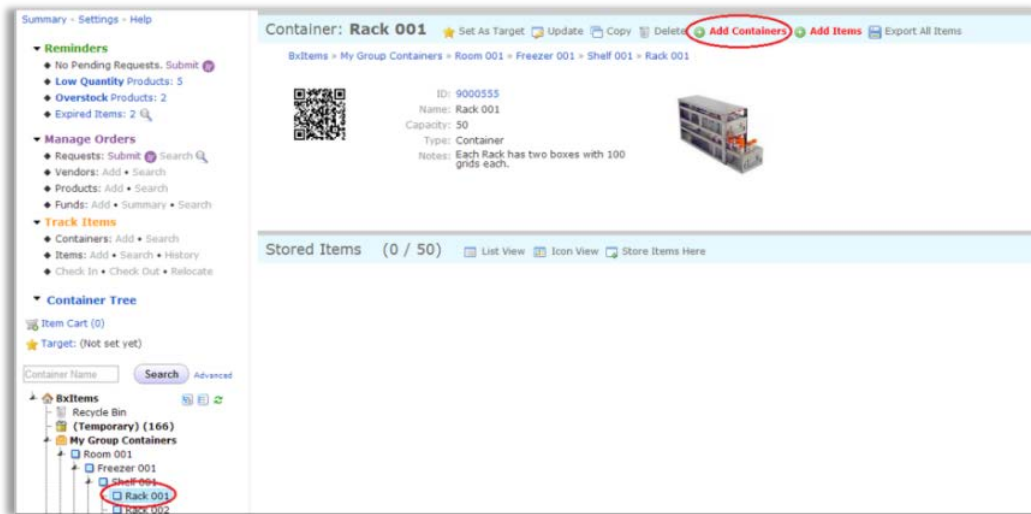
☒ Choose File rack.jpg

Attach Files:  No file chosen

No file chosen

## Tier 5: Trays in the Rack

Click on the rack you would like to add boxes/trays to, and select **Add Containers**.



If your box/tray has storage grids, choose **Grid/Box** or **Series of Grid/Box**. This is where your items will be stored. Specify the number of grids in your box/tray, enter a prefix, and the capacity of each grid/cell.

**Add Containers** [Import Containers](#) [Search Containers](#)

☐ Single container ☐ Series of containers ☐ Grid/Box ☒ Series of Grid/Box

Number of Grid/Box:

Grid/Box Prefix:

Grid/Box Size: Rows:  Columns:

Cell Capacity:  (Maximum: 500)

Type:

Description:

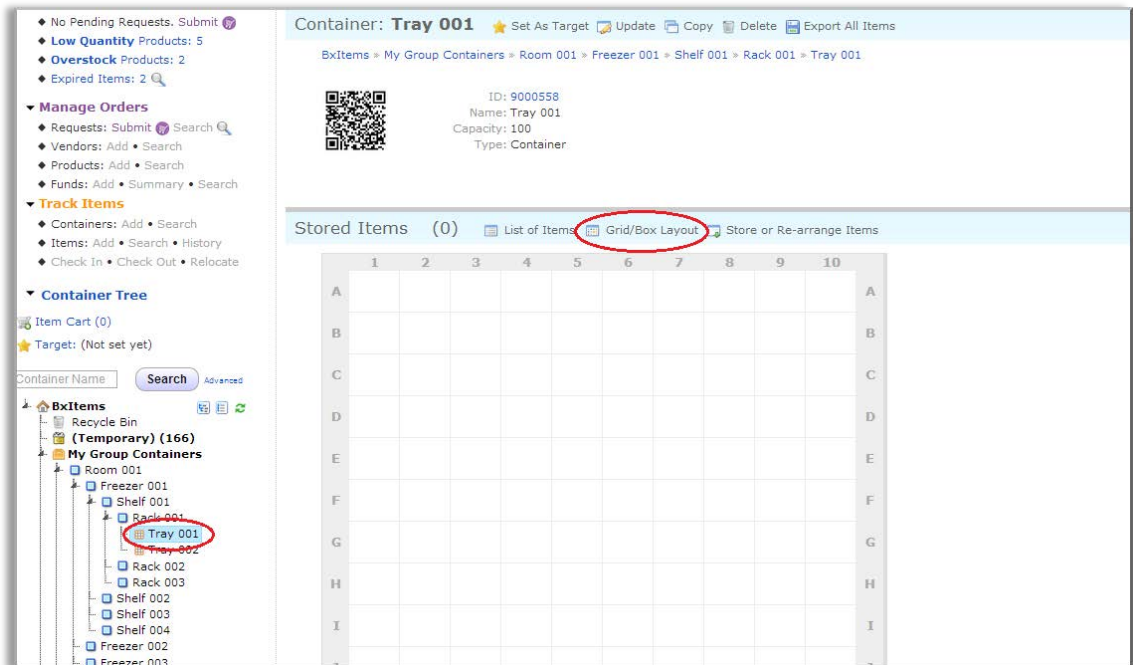
Notes:

No file chosen

Attach Files:  No file chosen

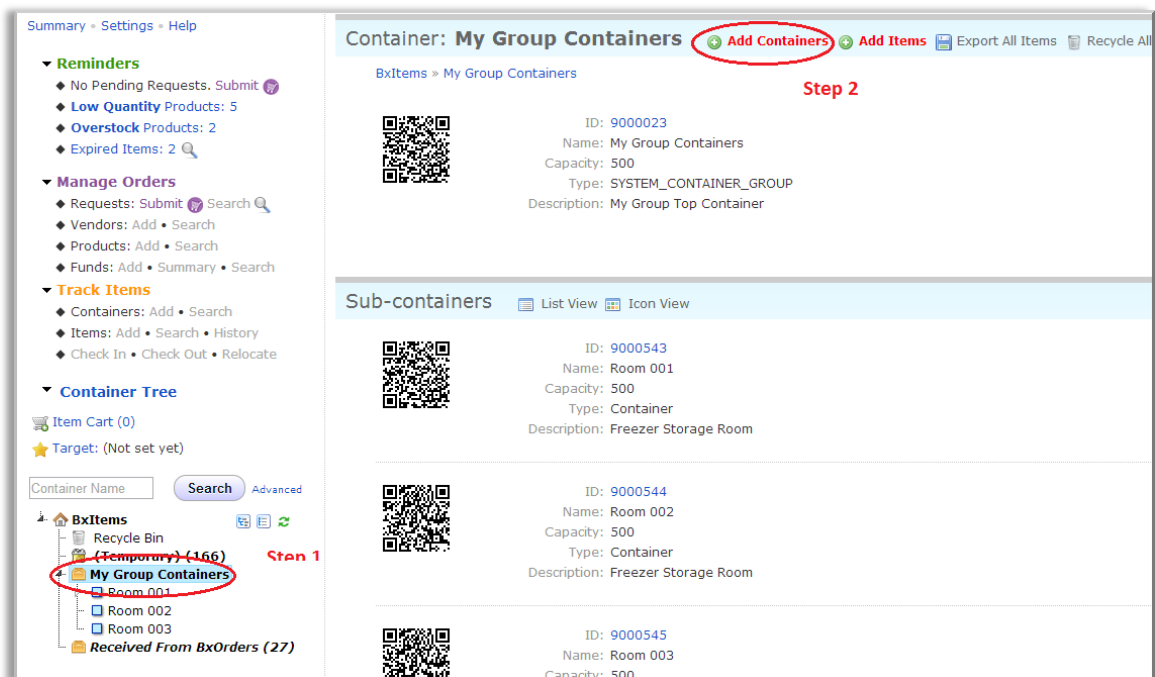
No file chosen

To view the grids in your tray/box, select the box in the container tree or the container list and choose **Grid/Box Layout**.



### 5.1.2: Import Containers

To set up containers from an import, select **My Group Containers – Add Containers – Import Containers**. It is highly recommended to plan out your containers in a map before adding containers with the import tool.



**Add Containers** [Import Containers](#) [Search Containers](#)

**Step 3**

☒ Single container
 ☐ Series of containers
 ☐ Grid/Box
 ☐ Series of Grid/Box

**Step 1:** Download the Excel Template, and enter your container information as shown in the example. Name the Parent Container for each new container. If it has grids, add number of rows and columns. **Your container names must be unique from those already in the system.**

A	B	C	D	E	F	G	H
Name	Parent	Capacity	Rows	Cols	Type	Description	Notes
Room 002	My Group Containers				Room		
Freezer 006	Room 002	500			Freezer		
Shelf 005	Freezer 006	500			Shelf		
Rack 004	Shelf 005	500			Rack		
Box 005	Rack 004	100	10	10	Box		

**Step 2:** Copy all headers and cells and paste into the import box, and submit.

**Import Containers**

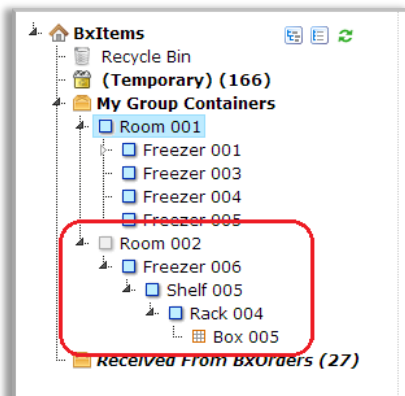
[» Help](#)
[» Show Available Column Names](#)
[» Excel Template](#)

Data:

Room 002	My Group Containers				Room
Freezer 006	Room 002	500			Freezer
Shelf 005	Freezer 006	500			Shelf
Rack 004	Shelf 005	500			Rack
Box 005	Rack 004	100	10	10	Box

**Import**

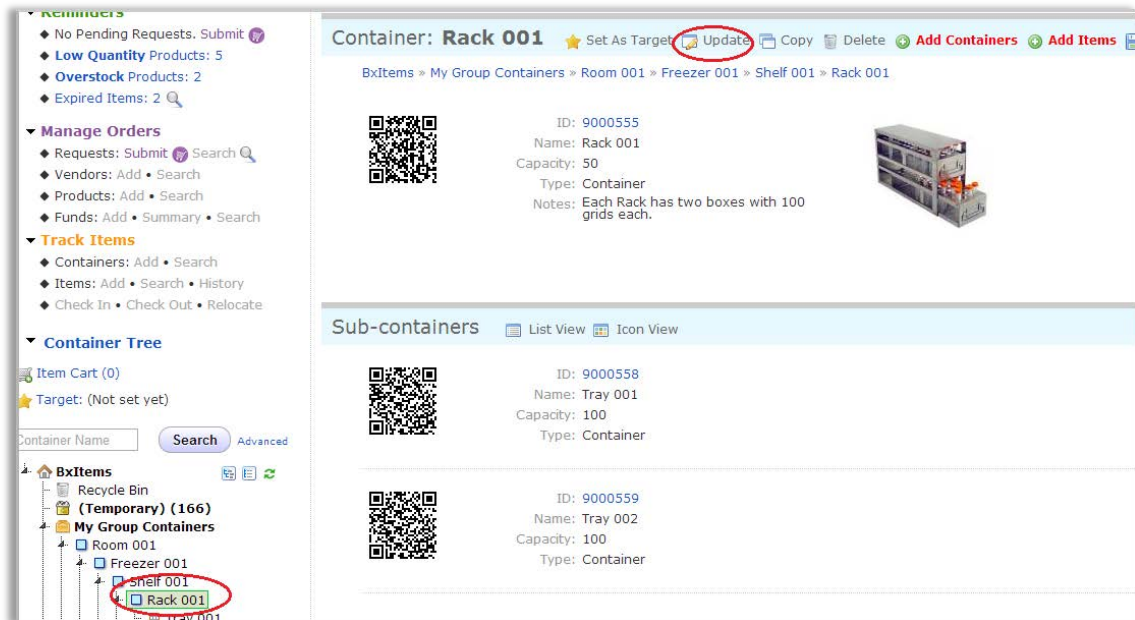
Your containers will import to the container tree, if listed properly.





### 5.1.3: Edit Containers

You may edit containers at any time by selecting the container and clicking on the update button.



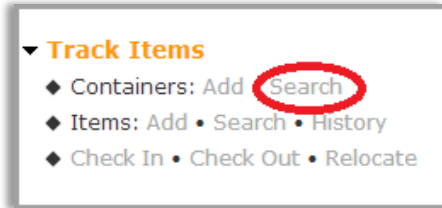
Update any necessary information (name of shelf, number of items allowed on shelf, grid size, photo, etc.)

A screenshot of the 'Update Container Settings' form. At the top are search bars for 'Search Products' and 'Search Items'. The form fields include: 'Name' (Rack 001), 'Capacity' (50, with a note '(Maximum: 500)'), 'Type' (Container), 'Description' (empty), and 'Notes' (Each Rack has two boxes with 100 grids each.). There are three 'Choose File' buttons for uploading images, each with the text 'No file chosen'. Below these is a red 'X' icon and the text 'rack.jpg'. A 'Submit' button is at the bottom.

**Resizing a grid will result in all items being moved to the temporary container.**

### 5.1.4: Search Containers

To search for containers, click **Containers: Search** in the left sidebar menu.



Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings.

Search Advanced Browse All Actions for Selected Bookmarks Results 1 - 23 of 23 (page 1 of 1)

No	<input type="checkbox"/> Name	Type	Rows	Cols	Capacity	Notes	
1	<input type="checkbox"/> Box 005	Box	10	10	0		
2	<input type="checkbox"/> Freezer 001	Container	1	1	100		
3	<input type="checkbox"/> Freezer 003	Container	1	1	100		
4	<input type="checkbox"/> Freezer 004	Container	1	1	100		
5	<input type="checkbox"/> Freezer 005	Container	1	1	100		
6	<input type="checkbox"/> Freezer 006	Freezer	1	1	500		
7	<input type="checkbox"/> My Group Containers	SYSTEM_CONTAINER_GROUP	1	1	500		
8	<input type="checkbox"/> Rack 001	Container	1	1	50	Each Rack has two boxes with 100 grids each.	
9	<input type="checkbox"/> Rack 002	Container	1	1	50	Each Rack has two boxes with 100 grids each.	Click to edit...
10	<input type="checkbox"/> Rack 003	Container	1	1	50	Each Rack has two boxes with 100 grids each.	
11	<input type="checkbox"/> Rack 004	Rack	1	1	500		
12	<input type="checkbox"/> Received From BxOrders	SYSTEM_CONTAINER_BXORDERS	1	1	500		Items: 27
13	<input type="checkbox"/> Recycle Bin	SYSTEM_CONTAINER_TRASH	1	1	500		
14	<input type="checkbox"/> Room 001	Container	1	1	500		
15	<input type="checkbox"/> Room 002	Room	1	1	0		
16	<input type="checkbox"/> Shelf 001	Container	1	1	50	Each Shelf holds 3 racks	
17	<input type="checkbox"/> Shelf 002	Container	1	1	50	Each Shelf holds 3 racks	
18	<input type="checkbox"/> Shelf 003	Container	1	1	50	Each Shelf holds 3 racks	
19	<input type="checkbox"/> Shelf 004	Container	1	1	50	Each Shelf holds 3 racks	
20	<input type="checkbox"/> Shelf 005	Shelf	1	1	500		
21	<input type="checkbox"/> Temporary	SYSTEM_CONTAINER_UNSTORED	1	1	500		Items: 166
22	<input type="checkbox"/> Tray 001	Container	10	10	0		

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

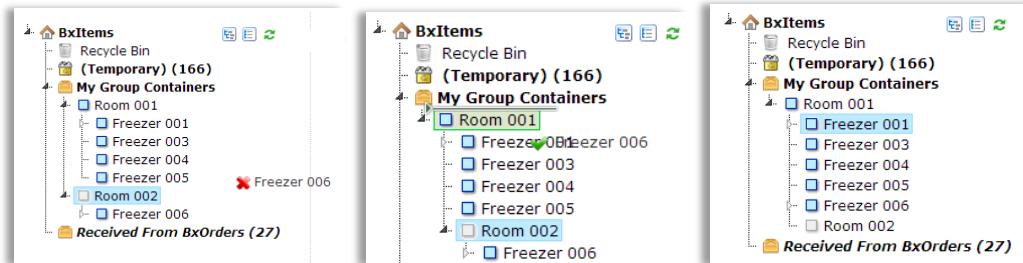
The screenshot shows the BxAF Search dialog box with several red circles highlighting specific features:

- Search Criteria:** Three rows of search criteria, each with a field selector (currently set to "(All Fields)"), a search operator (currently set to "contains"), and a text input field. Boolean operators "AND" and "OR" are available for each row.
- Select Fields to Display:** A section with two columns: "Available Fields" and "Selected Fields".
  - Available Fields:** Lists "Grid Capacity", "Parent ID", and "Description".
  - Selected Fields:** Lists "Name", "Type", "Rows", "Cols", "Capacity", and "Notes".
  - Buttons:** Between the columns are buttons for ">>", "All >>", "<<", and "All <<". To the right of the "Selected Fields" list are "Up" and "Down" arrow buttons.
- Field Sorting Options:** A section with a dropdown menu (currently set to "Name") and radio buttons for "Ascending" (selected) and "Descending".
- Other Options:** A section with a "Records Per Page:" label and a dropdown menu (currently set to "50").

A tip at the bottom of the "Select Fields to Display" section reads: "Tip: Hold Ctrl key to select multiple fields." At the bottom right are "Search" and "Cancel" buttons.

### 5.1.5: Relocating Containers

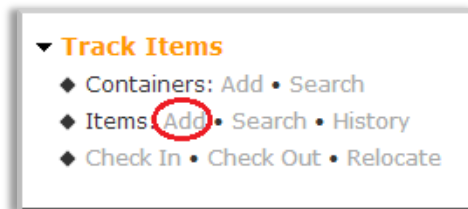
Containers can be moved easily in the tree view by using drag and drop. Open your tree and select a container to move with your mouse, and drag it into the desired location. When you begin dragging your item, it will have a **small red X**. When your mouse reaches the desired location, you will see a **green checkmark**, and the item can be dropped.



## 5.2: Items

### 5.2.1: Add Items without Ordering

When you order and receive items, they are automatically added to your inventory in the **Received From BxOrders** container. To add new items to your inventory without using the ordering function, use the **Add Items** function from the **Home Screen** or left sidebar menu.



**Item Name and Quantity** are required fields. If you do not add a barcode, the system will generate one automatically.

If you would like to add products for future ordering, use the link at the top of the page.

You may attach up to 3 files such as documents or photos to your items.

**Choose a Destination Container:** Select a container before adding items, or search for the container within the Add items tool. You can add items to your temporary (unstored) container to store later, or add directly to a container you have set up.

Summary • Settings • Help

Search Products Search All Products Search Items Search All Items

### Add Items without Ordering

Tips: \* Indicates required fields.

\* Item Name: Reagent07

\* Quantity: 1

Description:

Vendor: Agilent ☒ Add one if not exist [Add Vendors](#)

Tips: Items with Vendor information can be re-ordered in the future.

Catalog:

Unit Size:

Type: Reagents

Lot Number:

Expiration Date:

Notes:

Minimum Quantity: 4

Attach Files: [Choose File](#) No file chosen

**Destination Container:**

- ☐ Temporary Container
- ☒ Shelf 001 (Selected Container)
- ☐ Rack 001
- ☐ Rack 002
- ☐ Rack 003
- ☐ Box 005

Search container: Box [Search](#)

[Save](#)

**Choose destination container through search, or use temporary or selected container.**

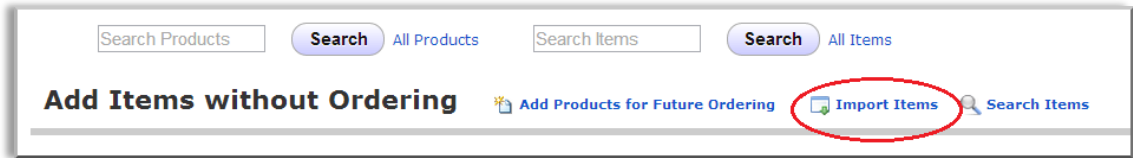
**Left Sidebar Menu:**

- ▼ Reminders
  - ◆ No Pending Requests: Submit
  - ◆ Low Quantity Products: 5
  - ◆ Overstock Products: 2
  - ◆ Expired Items: 2
- ▼ Manage Orders
  - ◆ Requests: Submit
  - ◆ Vendors: Add • Search
  - ◆ Products: Add • Search
  - ◆ Funds: Add • Summary • Search
- ▼ Track Items
  - ◆ Containers: Add • Search
  - ◆ Items: Add • Search • History
  - ◆ Check In • Check Out • Relocate
- ▼ Container Tree
  - Item Cart (0)
  - ★ Target: (Not set yet)
  - Container Name: [Search](#) [Advanced](#)
  - BxItems
    - Recycle Bin
    - (Temporary) (166)
    - My Group Containers
      - Room 001
        - Freezer 001
          - Shelf 001**
          - Rack 001
          - Rack 002
          - Rack 003
        - Shelf 002
        - Shelf 003
        - Shelf 004
        - Freezer 003
        - Freezer 004
        - Freezer 005
        - Freezer 006
      - Room 002
    - Received From BxOrders (27)

## 5.2.2: Import Items

Items may also be imported from Excel. Use the Import tool to import new items.

**Step 1:** From the Add Items Page, select **Import Items**.

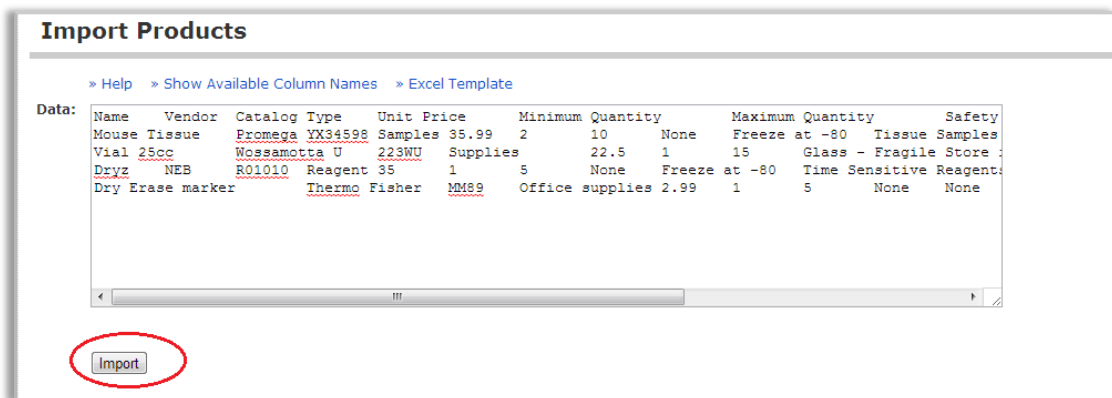


The screenshot shows a navigation bar with the following elements: a 'Search Products' input field, a 'Search' button, a link to 'All Products', another 'Search Items' input field, a second 'Search' button, and a link to 'All Items'. Below this is a section titled 'Add Items without Ordering' which includes a link to 'Add Products for Future Ordering' and the 'Import Items' button, which is circled in red. A 'Search Items' link with a magnifying glass icon is also present.

**Step 2:** Download the Excel Template to add your items. If you have several items already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.

A	B	C	D	E	F	G	H	I	J	K	L
Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description		
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples		
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials		
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents		
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red		

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.



The screenshot shows the 'Import Products' interface. At the top are links for 'Help', 'Show Available Column Names', and 'Excel Template'. Below is a 'Data:' section containing a table with the following data:

Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile
Dryz	NEB	R01010	Reagent	35	1	5	None
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None

Below the table is a scrollable area and an 'Import' button, which is circled in red.

**Step 4:** Click Refresh when prompted and you will be directed to the Product/Item list. Your new products will appear in the list.

		Search		Advanced	Browse All		Actions for Selected		Bookmarks
No	<input type="checkbox"/>	Type	Name	Vendor	Catalog	Unit Price	Description		
1	<input type="checkbox"/>	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit		
2	<input type="checkbox"/>	Reagent	Ascl	NEB	Cat#1	0			
3	<input type="checkbox"/>	Reagent	BamHI	NEB	Cat#4	0			
4	<input type="checkbox"/>	Reagent	BglII	NEB	Cat#5	0			
5	<input type="checkbox"/>	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers		
6	<input type="checkbox"/>	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System		
7	<input type="checkbox"/>	software	BxItems			359			
8	<input type="checkbox"/>	Lab Equipment	Centrifuge	VWR	E002	0			
9	<input type="checkbox"/>	Reagent	ClaI	NEB	Cat#7	0			
10	<input type="checkbox"/>	Office Supplies	Copy Paper	Thermo Fisher	V012	0			
11	<input type="checkbox"/>	Reagent	DpnI	NEB	Cat#8	0			
12	<input type="checkbox"/>	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red		
13	<input type="checkbox"/>	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents		
14	<input type="checkbox"/>	Reagent	EcoRI	NEB	R0101L	0			
15	<input type="checkbox"/>	Office Supplies	Folders	Thermo Fisher	V001	0			
16	<input type="checkbox"/>	Equipment	Lab Bench	Neoclone	0009988	2500			
17	<input type="checkbox"/>	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove		
18	<input type="checkbox"/>	Lab Equipment	Microscope	VWR	E001	0			
19	<input type="checkbox"/>	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System		
20	<input type="checkbox"/>	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples		
21	<input type="checkbox"/>	Reagent	pBR322	Life Technologies	Plasmid01	0			






### 5.2.3: Update and Copy Items

You can update existing items or add new items that are similar to already added items by using the **Update or Copy Items** function. Any item can be updated or saved as a new item.




Navigate to the item you would like to update, and select **Update/Copy**.

**Item Information**

ID: 1001455

Action:  Update/Copy  Relocate  Check Out  Check In  Delete

Storage:

Time Moved In	Added By	Quantity	Notes	Container	Grid
2013-04-04 14:40:19	Demo, BioInfoRx	1 <a href="#">»Update</a>		Temporary	  

Name: BgIII

Vendor:

Quantity: 1

Unit Size: Each

Enter your new information. To update an existing item, select **Update**, or you can save it as a new item.

**Update Item Information**

Product Information: **Vendor:**  
**Catalog:**  
**Unit:** Each  
[» Update Product](#)

Name:

Description:

Type: 

Samples

Lot Number:

Expiration Date:

Notes: 

Demo\_data

Minimum Quantity: 

3

Choose File

 No file chosen

Files: 

Choose File

 No file chosen

Choose File

 No file chosen

Update

Save as New Item



## Section 6: Managing Inventory Items

### 6.1: Store Items in a Container

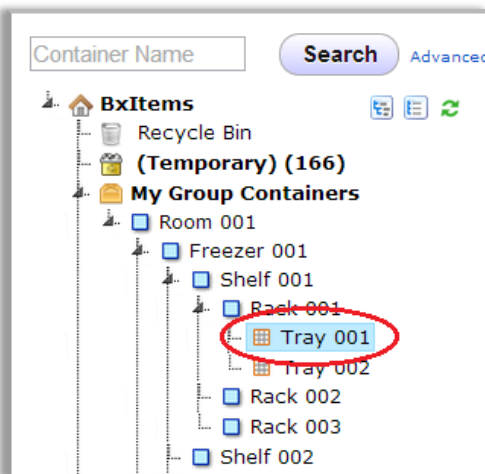
#### 6.1.1: Store Temporary Items

You can store your items located in the **Temporary** container by selecting the container to store items to, and choose **Store or rearrange items**.

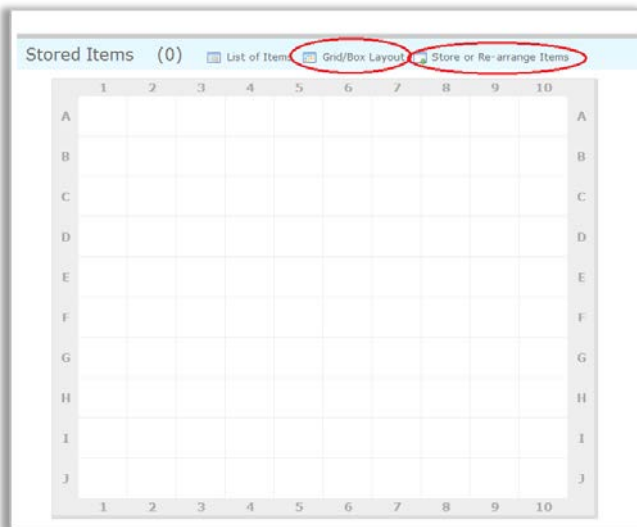
Drag and drop items into your container, or choose **Auto allocate** to automatically store all items.

In this example, we will store items from the temporary container into Room 001 – Freezer 001 – Shelf 001 – Rack001- Tray001.

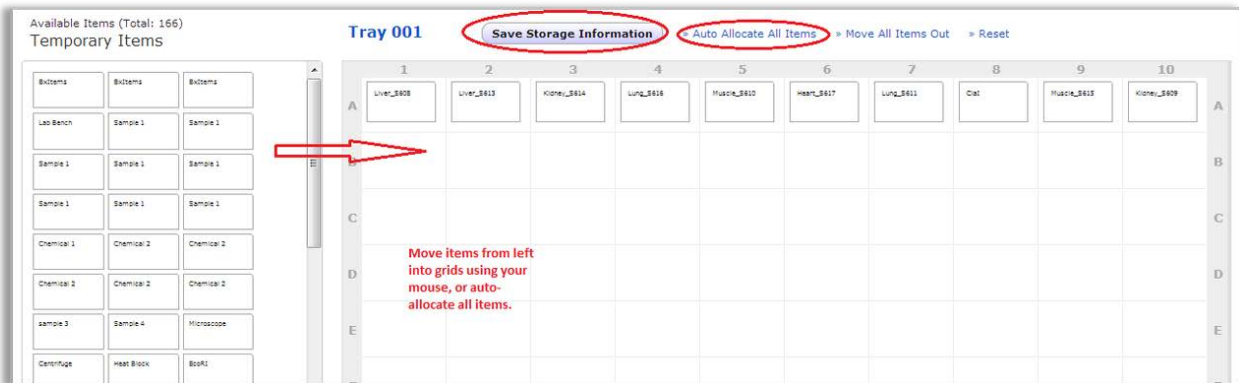
**Step 1:** Navigate to the container in which you wish to store items from the container tree.



**Step 2:** Select **Grid/Box Layout**, then **Store or Re-Arrange Items**.



**Step 3:** Drag and Drop Items or auto-allocate. Be sure to save storage information.



You may also re-arrange existing items using the same steps.

## 6.2: Relocate Items

In this example, we will relocate items that are **Received From BxOrders**.

### 6.2.1: Basic Relocate Items

**Step 1:** To relocate items to a new container, begin by opening up your container tree to view the containers you wish to move the items from. Select the items you wish to relocate, and click the **Relocate** link.

The screenshot shows the 'Stored Items' interface. On the left, the 'Container Tree' is expanded, showing a hierarchy of containers. The 'Received From BxOrders (27)' container is highlighted with a red circle. A red text box below it says 'Highlight container to move items from'. On the right, the 'Stored Items' list shows three items: 'Lab Bench', 'AscI', and 'pET21-a'. The 'Relocate' button is circled in red. A red text box on the right says 'Select items to relocate, or check all'.

Highlighted container in the tree: **Received From BxOrders (27)**

Red text: Highlight container to move items from

Red text: Select items to relocate, or check all

**Step 2:** Select the quantity of each item to relocate, and choose or search for the destination container. We will type "tray" in the search box to bring up available trays for storage. Click **Relocate Selected Items**.

The screenshot shows the 'Relocate Items' form. It contains a table with item details and a form for selecting the destination container. The 'Destination Container' section has radio buttons for 'Temporary Container', 'Received From BxOrders (Selected Container)', 'Tray 001', and 'Tray 002'. The 'Tray 002' radio button is selected and circled in red. The 'Search container' field contains the text 'tray' and the 'Search' button is circled in red. The 'Relocate Selected Items' button is also circled in red.

Item	Quantity	Storage ID	Time Added	Added By	Container	Grid
AscI	1	2001902	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	
pET21-a	3	2001903	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	

Set All Quantity To: ☐ 0 ☐ 1 ☒ Max ☐ Other:  Update Quantity

**Destination Container:**

☐ Temporary Container

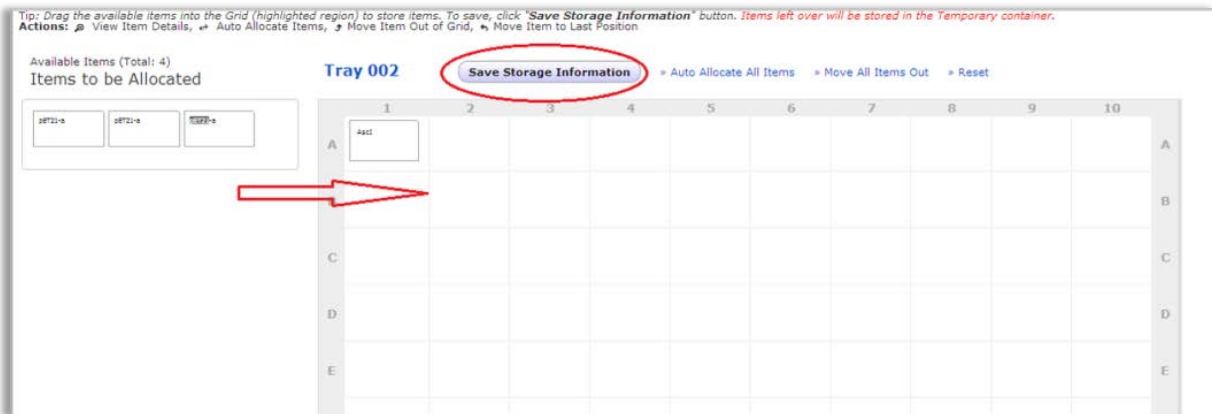
☐ Received From BxOrders (Selected Container)

☐ Tray 001

☒ Tray 002

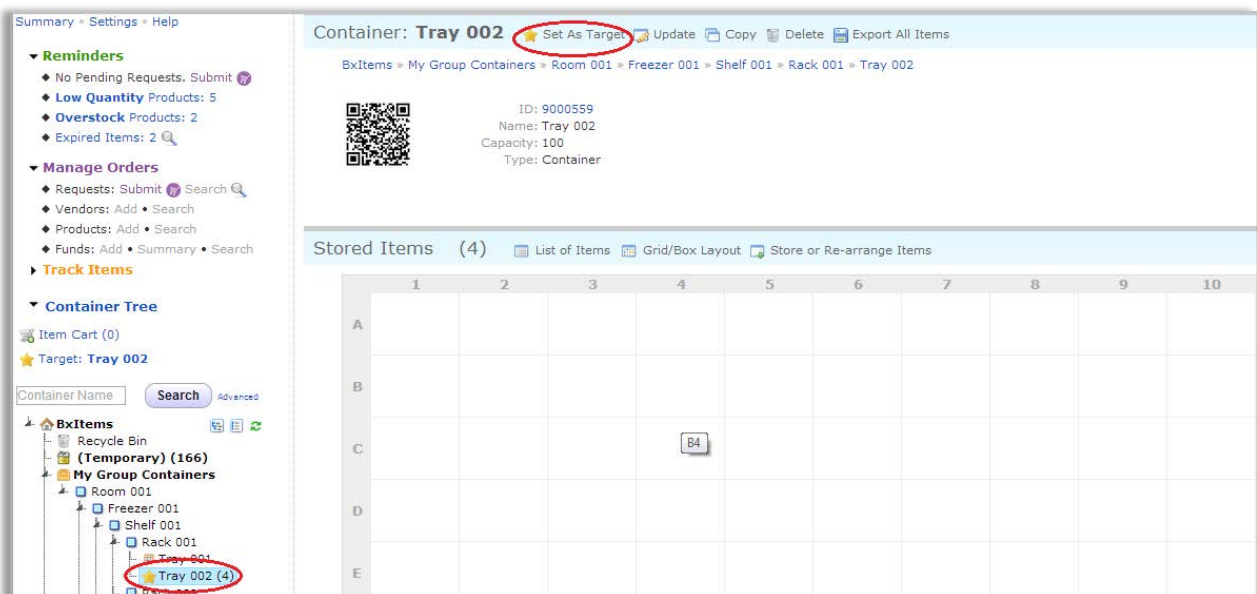
Search container:  tray

**Step 3:** Drag and Drop or auto-allocate items into the new container and save storage information.



### 6.2.2: Relocate Items Using Target

To quickly set a destination container for relocating items, set it as the target.



Go to the container to move items from, select items to relocate, and click [Move to Target](#). Your target container will remain the same until it is changed.

The screenshot displays a laboratory inventory management system. On the left, a 'Container Tree' shows a hierarchy starting with 'BxItems', followed by 'Recycle Bin', '(Temporary) (166)', and 'My Group Containers'. Under 'My Group Containers', 'Room 001' is expanded, showing 'Freezer 001' with a 'Shelf 001' containing 'Rack 001', 'Rack 002', and 'Rack 003'. 'Rack 001' contains 'Tray 001' and 'Tray 002 (4)'. 'Tray 002' is selected, and its parent 'Room 001' is circled in red. At the bottom of the tree, 'Received From BxOrders (23)' is also circled in red. The main panel, titled 'Stored Items (23 / 500)', shows a list of items with columns for Name, Quantity, Barcode, and Storages. Three items are listed: 'Lab Bench' (Qty: 9), 'AscI' (Qty: 2), and 'PET21-a' (Qty: 12). Each item has a QR code and a star icon. The 'Move To Target' button in the top toolbar is circled in red.

**Container Tree**

- ◆ Vendors: Add • Search
- ◆ Products: Add • Search
- ◆ Funds: Add • Summary • Search
- ▶ **Track Items**
- ▼ **Container Tree**
- Item Cart (0)
- ★ Target: **Tray 002**
- Container Name
- ▲ **BxItems**
- Recycle Bin
- (Temporary) (166)
- ▲ **My Group Containers**
- Room 001
- Freezer 001
  - Shelf 001
    - Rack 001
      - Tray 001
      - ★ Tray 002 (4)
    - Rack 002
    - Rack 003
  - Shelf 002
  - Shelf 003
  - Shelf 004
- Freezer 003
- Freezer 004
- Freezer 005
- Freezer 006
- Room 002
- Received From BxOrders (23)

**Stored Items (23 / 500)**

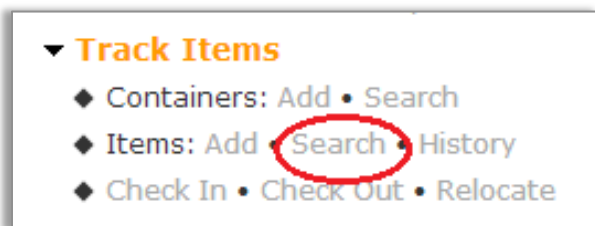
For Selected Items:

☐ Check All

<input type="checkbox"/>		Name: Lab Bench Quantity: 9 Barcode: Storages: Qty: 9
<input checked="" type="checkbox"/>		Name: AscI Quantity: 2 Barcode: Storages: Qty: 2
<input checked="" type="checkbox"/>		Name: PET21-a Quantity: 12 Barcode: Storages: Qty: 12

### 6.3: Search Items

To search for items, click **Items: Search** in the left sidebar menu.



Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings. You may also check in, check out, edit, or order items from the search menu using the icons on the right.

centrifuge		Search	Advanced	Browse All	Actions for Selected	Bookmarks	Results 1 - 50 of 74 (page 1 of 2)
No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions
1	AscI			Each	2	Order, check in, check out, or edit	Temporary (1), Tray 002 (1)
2	AscI			Each	1		Temporary (1)
3	AscI	NEB	Cat#1		2		Received From BxOrders (1), Tray 002 (1)
4	BamHI			Each	1		Temporary (1)
5	BamHI			Each	1		Temporary (1)
6	BglII			Each	1		Temporary (1)
7	BglII			Each	1		Temporary (1)
8	Black Marker			Each	2		Temporary (2)
9	Black Marker			Each	2		Temporary (2)
10	BxItems				1		Temporary (1)
11	BxItems				1		Temporary (1)
12	BxItems				1		Temporary (1)
13	Centrifuge			Each	1		Temporary (1)
14	Centrifuge			Each	1		Temporary (1)
15	Chemical 1	BioInfoRx		Each	1		Temporary (1)
16	Chemical 2			Each	5		Temporary (5)

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page. You may also opt to search for out of stock items from the advanced menu.

The screenshot shows the 'BxAF Search' dialog box. At the top, there are three search criteria rows, each with a dropdown menu set to '(All Fields)', a search operator dropdown set to 'contains', and an empty text input field. To the right of these rows are radio buttons for 'AND' (selected) and 'OR'. Below the search criteria is a section titled 'Select Fields to Display:'. This section contains two lists: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes Description, Type, Lot Number, Expiration Date, Notes, and Minimum Quantity. The 'Selected Fields' list includes Name, Vendor, Catalog, Unit Size, Quantity, and Files. Between these lists are buttons for moving fields: '>>', 'All >>', '<<', and 'All <<'. To the right of the 'Selected Fields' list are up and down arrow buttons. A tip below the lists reads: 'Tip: Hold Ctrl key to select multiple fields.' Below the field selection is a section titled 'Field Sorting Options:'. It has a dropdown menu set to 'Name' and radio buttons for 'Ascending' (selected) and 'Descending'. Below that is a section titled 'Other Options:'. It has a 'Records Per Page:' label with a dropdown menu set to '50'. At the bottom of this section is the 'Include Out of Stock Items:' label with radio buttons for 'Yes' and 'No' (selected). At the bottom right of the dialog are 'Search' and 'Cancel' buttons. Red circles are drawn around the field selection buttons, the up/down arrows, and the 'Include Out of Stock Items:' section.

**BxAF Search**

1. (All Fields) contains  ☒ AND ☐ OR

2. (All Fields) contains  ☒ AND ☐ OR

3. (All Fields) contains

**Select Fields to Display:**

Available Fields		Selected Fields
Description	>>	Name
Type	All >>	Vendor
Lot Number	<<	Catalog
Expiration Date	All <<	Unit Size
Notes		Quantity
Minimum Quantity		Files

Tip: Hold Ctrl key to select multiple fields.

**Field Sorting Options:**

1: Name ☒ Ascending ☐ Descending

**Other Options:**

Records Per Page: 50

**Include Out of Stock Items:** ☐ Yes ☒ No

Search Cancel

## 6.4: Check Items In and Out

Items can be checked in or out using barcodes or by navigating to the item and selecting **Check In** or **Check Out**. You will need to have a 1D Barcode scanner attached to your computer for standard barcode reading, or, you can scan QR codes using a QR reader on your Internet-Enabled touch pad or Smart Phone with a camera. BxItems will keep track of the number of checked out items.

### 6.4.1: Check Items Out By Scanning a 1D Barcode



**Step 1:** Select **Check Out Items** from the left sidebar menu.

**Step 2:** Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. *You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.*

**Step 3:** Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check out, and click **Check Out Items**.

Summary • Settings • Help

▼ Reminders

- ◆ No Pending Requests. Submit
- ◆ Low Quantity Products: 5
- ◆ Overstock Products: 2
- ◆ Expired Items: 2

▼ Manage Orders

- ◆ Requests: Submit Search
- ◆ Vendors: Add Search
- ◆ Products: Add Search
- ◆ Funds: Add Summary Search

▼ Track Items

- ◆ Containers: Add Search
- ◆ Items: Add Search History
- ◆ Check In **Check Out** Relocate

Step 1

### Check out Items

Find Items: 1001734 Search

Step 2: Scan Barcode or Search

Item	Quantity	Storage ID	Time Added	Added By	Container	Grid
AscI	1 / 2	2001902	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	
AscI	0 / 1	2001906	2013-04-22 15:28:22	Demo, BioInfoRx	Tray 002	

Set All Quantity To: ☐ 0 ☒ 1 ☐ Max ☐ Other:  Update Quantity

**Check Out Selected Items**

Step 3: Select Number to check out

One AscI will be checked out

### 6.4.2: Check Items In By Scanning a 1D Barcode

**Step 1:** Select **Check In Items** from the left sidebar menu.



**Step 2:** Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. *You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.*

Summary • Settings • Help

▼ **Reminders**

- ◆ No Pending Requests. [Submit](#)
- ◆ **Low Quantity** Products: 5
- ◆ **Overstock** Products: 2
- ◆ Expired Items: 2

▼ **Manage Orders**

- ◆ Requests: [Submit](#)
- ◆ Vendors: [Add](#) • [Search](#)
- ◆ Products: [Add](#) • [Search](#)
- ◆ Funds: [Add](#) • [Summary](#) • [Search](#)

▼ **Track Items**

- ◆ Containers: [Add](#) • [Search](#)
- ◆ Items: [Add](#) • [Search](#) • [History](#)
- ◆ **Check In** • [Check Out](#) • [Relocate](#)

▼ **Container Tree**

Item Cart (0)

★ Target: **Tray 002**

Container Name  [Search](#) [Advanced](#)

BxItems

- Recycle Bin
- (Temporary) (166)
- My Group Containers
  - Room 001
    - Freezer 001
      - Shelf 001
        - Rack 001
          - Tray 001**

### Check In Items

Search Items:

Scan barcodes here or search

[Search](#)

Set All Quantity To: ☒ 0 ☐ 1 ☐ Other:  [Update Quantity](#)

**Destination Container:**

☒ Temporary Container

☐ Tray 001 (Selected Container)

☐ Tray 002 (Target Container)

Search container:  [Search](#)

Check-in Notes:

[Check In Items](#)

**Step 3:** Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check in, choose or search for a destination container, and click **Check In Items**. You may also set a target container or select a container to check items in to before scanning items.

**Check In Items**

Search Items:

1051422

[Search](#)

Check In Quantity	Item	Description	Added By
1	ADD		Demo, Bechtold

Set All Quantity To: ☒ 0 ☐ 1 ☐ Other:  [Update Quantity](#)

**Destination Container:**

☐ Temporary Container

☐ Tray 001 (Selected Container)

☒ Tray 002 (Target Container)

Search container:  [Search](#)

Check-in Notes:

[Check In Items](#)

**Step 4:** Drag and Drop Items Into Container Grids.

### Store and Re-arrange Items in Grid/Box

Tip: Drag the available items into the Grid (highlighted region) to store items. To save, click "Save Storage Information" button. Items left over will be stored in the Temporary container.

Actions: View Item Details, Auto Allocate Items, Move Item Out of Grid, Move Item to Last Position

Available Items (Total: 5)

Items to be Allocated

Asci

Asci

pBT21-s

pBT21-s

pBT21-s

Tray 002

Save Storage Information

» Auto Allocate All Items » Move All Items Out » Reset

	1	2	3	4	5	6	7	8	9
A									
B									
C									

### 6.4.3: Check Items In or Out using QR Codes

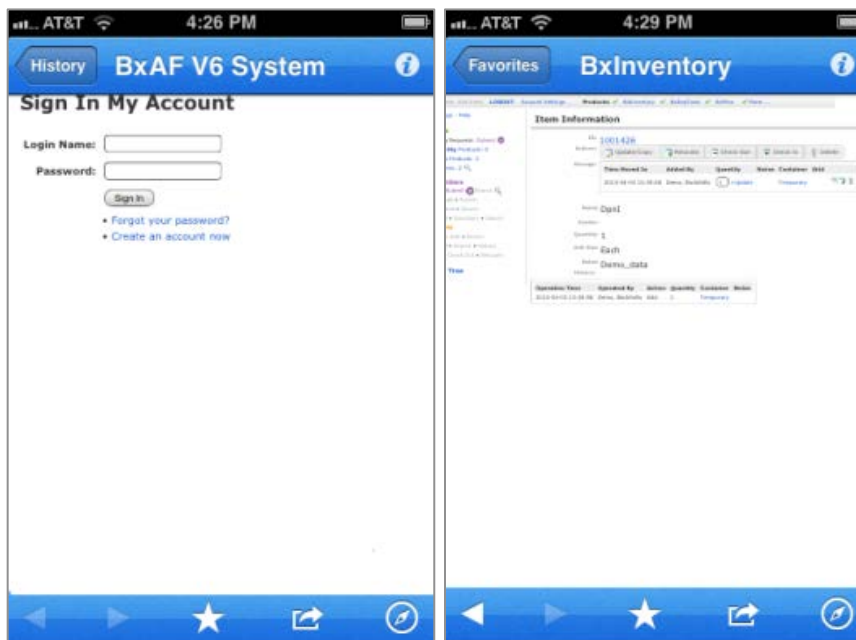


To check items in or out using QR Codes, use your mobile device with QR reader installed.

A QR code will contain both the item ID number and the url of the item. Scanning the QR code will direct you to the item's web url, where it can be checked out.

Scan the item's QR code, and you will be directed to the item information as seen below.

Proceed to check in or check out your items (if you are not logged in to BxInventory, you will be prompted to log in first).



Item Information

ID: 1001423

Actions:

Update/Copy

Relocate

Move To Target

Check Out

Check In

Delete

Storage:

Time Moved In	Added By	Quantity	Notes	Container	Grid
2013-04-03 13:34:56	Demo, BioInfoRx	1	>Update	Temporary	<div></div> <div></div> <div></div>

Name: BamHI

Vendor:

Quantity: 1

Unit Size: Each

Notes: Demo\_data

History:

Operation Time	Operated By	Action	Quantity	Container	Notes
2013-04-03 13:34:56	Demo, BioInfoRx	Add	1	Temporary	

You may also attach QR Codes to your containers, allowing you to scan the barcode on the container and view its contents on your mobile device.

Container: Freezer 001

Set As Target

Update

Copy

Delete

Add Containers

Add

BxItems » My Group Containers » Room 001 » Freezer 001



ID: 9000546

Name: Freezer 001

Capacity: 100

Type: Container

Description: -80C Freezer for Reagents

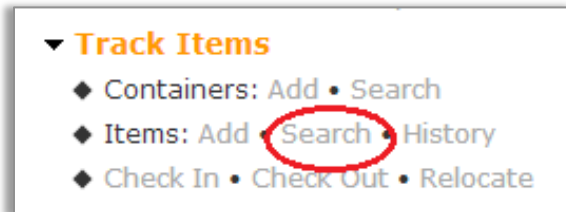


67

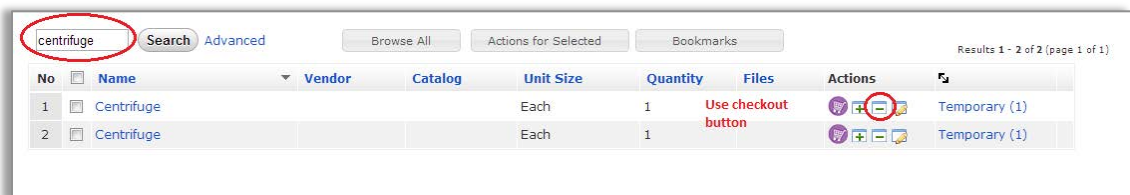
## 6.4.4: Check Items In or Out Without Scanning a Barcode

### 6.4.4.1: Check Items In or Out Method 1

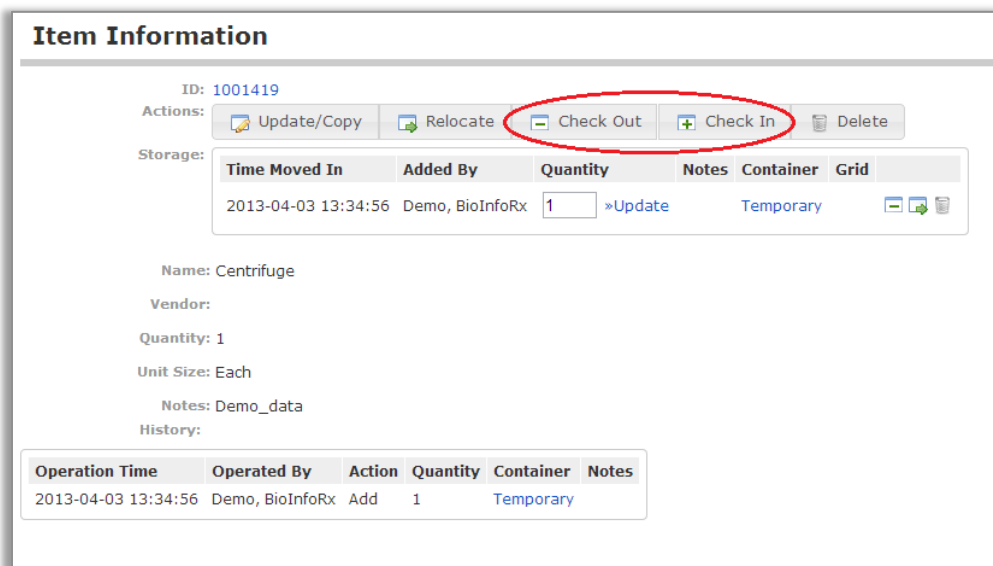
Search for an Item to check in or out:



Check in or out directly from search screen



Or, open item detail and check in or out.



#### 6.4.4.2: Check In or Out From a Container

Navigate to the item in a container you wish to check out and select the item, then the **Check In** or **Check Out** Option. This will allow you to check items in or out of the container directly.

**Container: Tray 002** Set As Target Update Copy Delete Export All Items

BxItems > My Group Containers > Room 001 > Freezer 001 > Shelf 001 > Rack 001 > Tray 002

ID: 9000559  
Name: Tray 002  
Capacity: 100  
Type: Container

**Stored Items (5)** List of Items Grid/Box Layout Store or Re-arrange Items

For Selected Items: Add to Cart Check Out Relocate Update Delete Export

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001724	Ascl	NEB	Cat#1	A0: 1
2	1001725	pET21-3	Life Technologies	Plasmid02	A0: 3
3	1001722	Ascl		Each	A0: 1

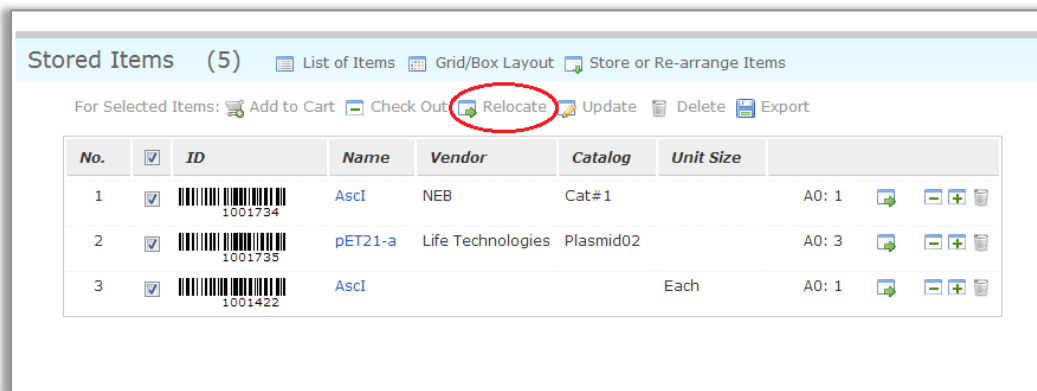
**Container Tree**

- BxItems
  - Recycle Bin
  - (Temporary) (166)
  - My Group Containers
    - Room 001
      - Freezer 001
        - Shelf 001
          - Rack 001
            - Tray 002 (5)

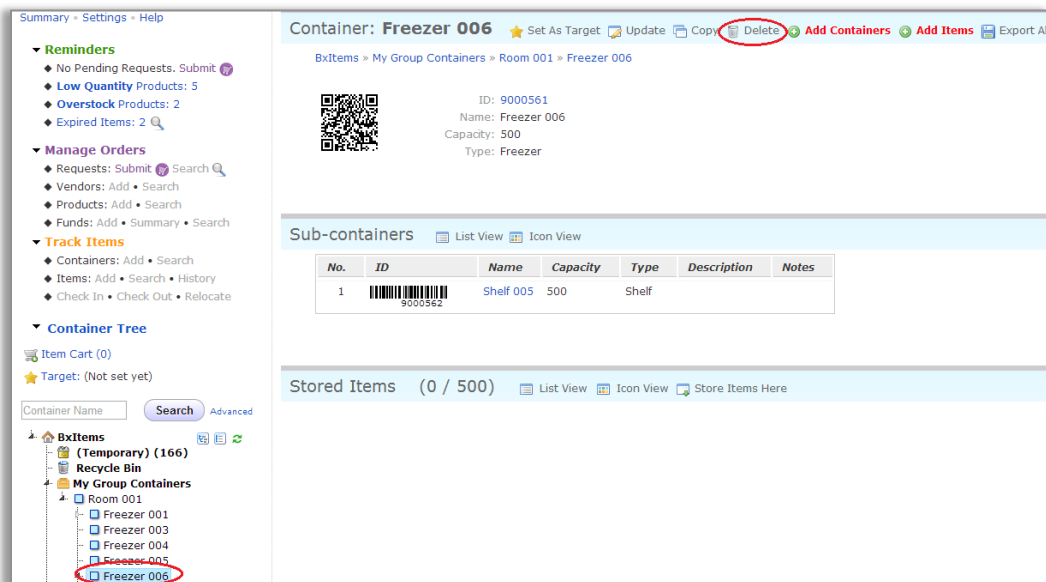
## Section 7: Deleting Containers and Items

### 7.1: Deleting Containers

Containers may be deleted at any time. If you do not wish to delete the items in a container, move all items out (relocate) before deleting a container. If you do not relocate your items, they will be deleted (into recycle bin) with the container.



To delete a container, navigate to the container in the Container Tree, then click **Delete**. The container will be moved to the recycle bin until it is permanently deleted. All subcontainers will be moved to the recycle bin with the top container being deleted.



## Delete Container

Are you sure you want to move this container to the recycle bin?

☒ Yes, move this container to the Recycle Bin

**Submit**

Container Name  **Search** [Advanced](#)

- BxItems
  - (Temporary) (166)
  - Recycle Bin**
  - Freezer 006**
  - My Group Containers
  - Received From BxOrders (22)
















Containers in the recycle bin can be restored using the [Relocate Containers](#) method. Drag and drop the container from the recycle bin to its desired location.

## 7.2: Deleting Products and Items

Products include all items that may or not currently be stored in containers. Products and stored inventory items differ in how they are listed and deleted.

### 7.2.1: Delete Products

Products may be deleted directly from the Search Products Page. Deleting a product will remove it from your inventory permanently.

<input type="text"/> <b>Search</b> <a href="#">Advanced</a> <a href="#">Browse All</a> <a href="#">Actions for Selected</a> <a href="#">Bookmarks</a> <span>Results 1 - 32 of 32 (page 1 of 1)</span>								
No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	software	BxItems			359		3	
2	Equipment	Lab Bench		0009988	2500		11	 <b>Delete Product</b>
3		Sample 1			0		8	
4	Samples	Sample 4			25		1	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	
6	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Gloves	0	
7	Lab Equipment	Microscope	VWR	E001	0		0	
8	Lab Equipment	Centrifuge	VWR	E002	0		0	
9	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	
10	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System	0	
11	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
12	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
13	Reagent	EcoRI	NEB	R0101L	0		0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	
15	Reagent	AscI	NEB	Cat#1	0		2	
16	Reagent	BamHI	NEB	Cat#4	0		0	
17	Reagent	BglII	NEB	Cat#5	0		0	

### 7.2.2: Delete Inventory Items

Inventory items in containers are deleted from their storage container by moving them to the Recycle Bin.

The screenshot shows the 'Tray 002' container page. On the left is a sidebar with navigation menus: 'Manage Orders', 'Track Items', and 'Container Tree'. The 'Container Tree' shows a hierarchy: BxItems (Temporary) (166) > Recycle Bin > My Group Containers > Room 001 > Freezer 001 > Shelf 001 > Rack 001 > Tray 001 > Tray 002 (5). The main area displays container details: ID: 9000559, Name: Tray 002, Capacity: 100, Type: Container. Below this is a 'Stored Items (5)' section with a table of items. The 'Delete' button in the top action bar is circled in red.

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001734	Asci	NEB	Cat#1	A0: 1
2	1001735	pET21-a	Life Technologies	Plasmid02	A0: 3
3	1001432	Asci			Each

### 7.3: Empty Recycle Bin

To delete all items and containers in the Recycle Bin, highlight the container to remove from the Recycle Bin and Click **Delete**.

The screenshot shows the 'Freezer 006' container page. The sidebar is similar to the previous screenshot, but 'Freezer 006' is highlighted in the 'Container Tree'. The main area displays container details: ID: 9000561, Name: Freezer 006, Capacity: 500, Type: Freezer. Below this is a 'Sub-containers' section with a table of sub-containers. The 'Delete' button in the top action bar is circled in red.

No.	ID	Name	Capacity	Type	Description	Notes
1	9000562	Shelf 005	500	Shelf		

Verify your deletion and submit.



## Delete Container

Are you sure you want to permanently delete this container?

➡ This container has sub-containers.

☒ Yes, permanently delete this container and all sub-containers.

☒ Yes, permanently delete this container and remove the stored items.

## Section 8: Advanced Functions

### 8.1: Bookmark Searched Items

You can save any search (products, items, vendors, funds) as a bookmark/saved search. For example, easily find all of your reagents by saving your reagents product search. Search your term, then click **Bookmarks** à **Bookmark Current Search**.

Bookmark Current Search

No	Type	Name	Vendor	Catalog	Unit Price				Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0				
2	Reagent	AscI	NEB	Cat#1	0			2	
3	Reagent	BamHI	NEB	Cat#4	0			0	
4	Reagent	BglII	NEB	Cat#5	0			0	
5	Reagent	ClaI	NEB	Cat#7	0			0	
6	Reagent	DpnI	NEB	Cat#8	0			0	
7	Reagent	Dryz	NEB	R01010	35		Time Sensitive Reagents	0	
8	Reagent	EcoRI	NEB	R0101L	0			0	
9	Reagent	pBR322	Life Technologies	Plasmid01	0			0	
10	Reagent	pET21-a	Life Technologies	Plasmid02	0			18	
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0			0	
12	Reagent	SacII	NEB	Cat#9	0			0	
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0			0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0		ThermoPol® Reaction Buffer	0	
15	Reagent	XmaI	NEB	Cat#10	0			0	

Name the Bookmark and Save.

Search Bookmarks

New Search Name: Reagents

Save

Cancel

The next time you return to the Search Screen, your saved search will appear under Bookmarks.

Search

Advanced

Browse All

Actions for Selected

Bookmarks

Bookmark Current Search

Reagents

Results 1 - 15 of 15 (page 1 of 1)

No	Type	Name	Vendor	Catalog	Unit Price		Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0		
2	Reagent	AscI	NEB	Cat#1	0		

## 8.2: Item History Logs

Track Items

Containers: Add • Search

Items: Add • Search • History

Check In • Check Out • Relocate

From the left sidebar menu, choose **Items – History**. You will be directed to your complete item history, which includes all actions performed with each item. Item History is searchable, sortable, and can be bookmarked.

Search

Advanced

Browse All

Bookmarks

Results 1 - 50 of 78 (page 1 of 2)

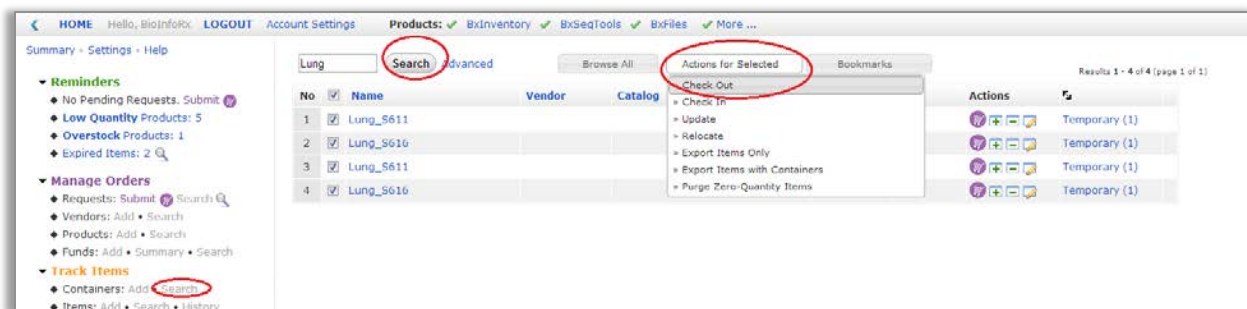
No	Action	Container Name	Grid	Item Name	Quantity	Operated By	Time Operated	Notes
1	Add	Box 1		Sample 1	10	Demo, BioInfoRx	2013-03-13 09:15:21	
2	Check Out	Box 1	A1	Sample 1	1	Demo, BioInfoRx	2013-03-13 09:20:11	
3	Check Out	Box 1	A10	Sample 1	1	Demo, BioInfoRx	2013-03-13 09:22:40	
4	Add	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:25:26	
5	Check Out	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:25:48	
6	Check In	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:26:14	
7	Add	Temporary		Chemical 2	10	Demo, BioInfoRx	2013-03-13 09:28:45	
8	Check Out	Temporary		Chemical 2	5	Demo, BioInfoRx	2013-03-13 09:29:10	
9	Add	Box 1		sample 3	1	Demo, BioInfoRx	2013-03-13 09:46:11	
10	Received from Orders	Received From BxOrders		Sample 4	1	Demo, BioInfoRx	2013-03-13 09:49:43	Request ID: 8000049, Requested By: D BioInfoRx, Date Requested: 2013-03-13
11	Add	Temporary		Liver_S608	1	Demo, BioInfoRx	2013-04-03 13:34:56	

## 8.3 Bulk Actions

### 8.3.1: Bulk Check Out/Check In

Check in or check out several items at once using the Items-Search page.

Search item to check out, or select a group of items. With selected items, click [Actions For Selected](#), then [Check Out](#) or [Check In](#).



You may now check out or check in all of the selected items at once.

### Check In Items

Check In Quantity	Item	Description	Added By
<input type="text" value="0"/>	Lung_S611	Lung Sample, Mouse S611	Demo, BioInfoRx
<input type="text" value="0"/>	Lung_S616	Lung Sample, Mouse S616	Demo, BioInfoRx
<input type="text" value="0"/>	Lung_S611	Lung Sample, Mouse S611	Demo, BioInfoRx
<input type="text" value="0"/>	Lung_S616	Lung Sample, Mouse S616	Demo, BioInfoRx

Set All Quantity To: ☒ 0 ☐ 1 ☐ Other:  [Update Quantity](#)

**Destination Container:**

☒ Temporary Container

☐ Freezer 006 (Selected Container)

Search container:  [Search](#)

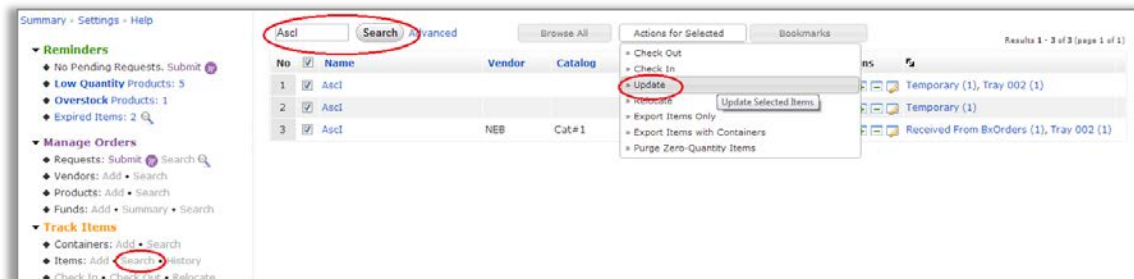
Check-in Notes:

[Check In Items](#)

### 8.3.2: Bulk Update Items or Products

Bulk update several items or products at once using the Bulk Update feature.

Search item to update, or select a group of items. With selected items, click [Actions For Selected](#), then [Update](#).



Check the fields you are updating to enter information. All items will update at once.

### Update Multiple Items

Note: You are going to update 3 selected item(s). Check fields to update.

Vendor: ☐

Catalog: ☐

Unit Size: ☐

Description: ☐

Type: ☐

Lot Number: ☒

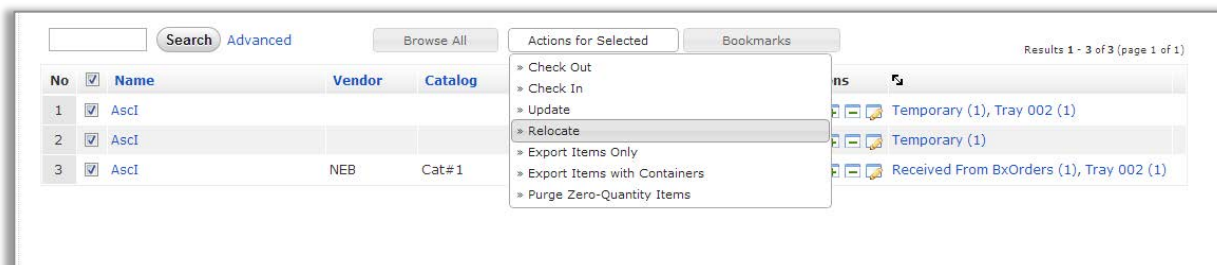
Expiration Date: ☒

Notes: ☐

Minimum Quantity: ☐

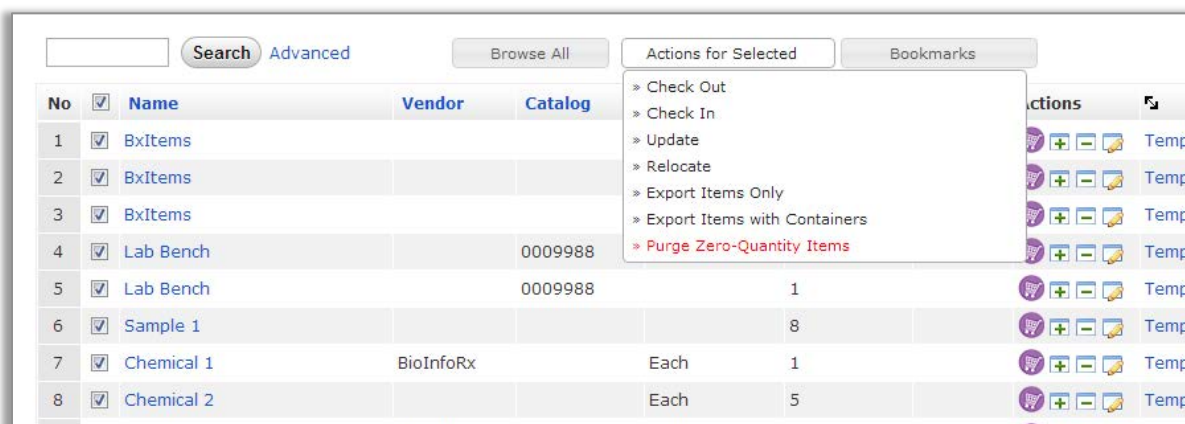
### 8.3.3: Bulk Relocate Items

Search items to relocate or select a group of items. With selected items, click [Actions For Selected](#), then [Relocate](#).



### 8.3.4: Purge Zero-Quantity Items

To purge Zero-quantity items, search for or select items and click [Actions for Selected](#) –Purge Zero-quantity Items.



## 8.4: Item Shopping Cart

Sometimes, you may need to work with items that are stored across several containers. You can easily add items to your “shopping cart” and work with them as a group later.

For example, we want to move a few items from the **Temporary** and **Received From BxOrders** Containers to Tray 001.

**Step 1:** Set Tray 001 as Target container.

The screenshot displays the BxItems web application interface. On the left is a sidebar menu with sections: Reminders, Manage Orders, Track Items, and Container Tree. The Container Tree shows a hierarchy: BxItems > (Temporary) (166) > Recycle Bin > My Group Containers > Room 001 > Freezer 001 > Shelf 001 > Rack 001 > Tray 001. The 'Tray 001' item is circled in red. The main content area is titled 'Container: Tray 001' and features a 'Set As Target' button (star icon) circled in red, along with 'Update', 'Copy', 'Delete', and 'Export All Items' buttons. Below the title is a breadcrumb trail: BxItems » My Group Containers » Room 001 » Freezer 001 » Shelf 001 » Rack 001 » Tray 001. A QR code is shown next to the container details: ID: 9000558, Name: Tray 001, Capacity: 100, Type: Container. At the bottom, the 'Stored Items (0)' section is visible with options for 'List of Items', 'Grid/Box Layout', and 'Store or Re-arrange Items'.

**Step 2:** Go to the **Temporary Container**, select three samples, and click Add to cart. Notice that the **Shopping Cart** icon now shows 3 items.

**Temporary Items (166)** List View Icon View Print

For Selected Items: **Add to Cart** Check Out Relocate Move To Target Update Delete Export

No.	ID	Name	Vendor	Catalog	Unit Size	Qty
1	1000510	Sample 1				Qty: 8
2	1000511	Chemical 1	BioInfoRx		Each	Qty: 1
3	1000512	Chemical 2			Each	Qty: 5
4	1001409	Liver_S608			Each	Qty: 1
5	1001410	Kidney_S609			Each	Qty: 1
6	1001411	Muscle_S610			Each	Qty: 1
7	1001412	Lung_S611			Each	Qty: 1
8	1001413	Liver_S613			Each	Qty: 1
9	1001414	Kidney_S614			Each	Qty: 1
10	1001415	Muscle_S615			Each	Qty: 1
11	1001416	Lung_S616			Each	Qty: 1

**Step 3:** Go to **Received From BxOrders**, select more items and add them to cart.

**Container: Received From BxOrders** Add Containers Add Items Export All Items

BxItems » Received From BxOrders

ID: 9000022  
Name: Received From BxOrders  
Capacity: 500  
Type: SYSTEM\_CONTAINER\_BXORDERS  
Description: Items Received from BxOrders

**Stored Items (23 / 500)** List View Icon View Store Items Here Print

For Selected Items: **Add to Cart** Check Out Relocate Move To Target Update Delete Export

No.	ID	Name	Vendor	Catalog	Unit Size	Qty
1	1001733	Lab Bench		0009988		Qty: 9
2	1001734	Ascl	NEB	Cat#1		Qty: 1
3	1001735	pET21-a	Life Technologies	Plasmid02		Qty: 12
4	1001741	Mouse Tissue	Promega	YX34598		Qty: 1

The Cart now contains 16 samples from two different locations.

**Step 4:** Click the Cart icon to perform actions such as Move, Relocate, Update, etc. You may also empty the cart from here.



We will simply click **Move to Target** to move the items to Sample Tray 001.

### Items in Cart

Item	Quantity	Storage ID	Time Added	Added By	Container	Grid
Liver_S608	1	2001508	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
Kidney_S609	1	2001509	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
Muscle_S610	1	2001510	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
pET21-a	12	2001903	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	
Mouse Tissue	1	2001912	2013-04-23 16:53:10	Demo, BioInfoRx	Received From BxOrders	

**For All Items:**

- Check out Items
- Move to Target**
- Bulk Update
- Relocate Items
- Export Information
- Print Information
- Move to Recyclebin
- Empty Cart

**Step 5:** Allocate Your Items.

### Store and Re-arrange Items in Grid/Box

Tip: Drag the available items into the Grid (highlighted region) to store items. To save, click "Save Storage Information" button. Items left over will be stored in the Temporary container.

**Actions:** View Item Details, Auto Allocate Items, Move Item Out of Grid, Move Item to Last Position

Available Items (Total: 16)

Items in Cart

Liver\_S608

Kidney\_S609

Muscle\_S610

pET21-a

pET21-a

pET21-a

pET21-a

pET21-a

pET21-a

pET21-a

pET21-a

Mouse Tissue

**Tray 001**

Save Storage Information » Auto Allocate All Items » Move All Items Out » Reset

	1	2	3	4	5	6	7	8
A								
B								
C								
D								
E								

Cart and Target are meant for temporary use for each session, and will expire when you log out.



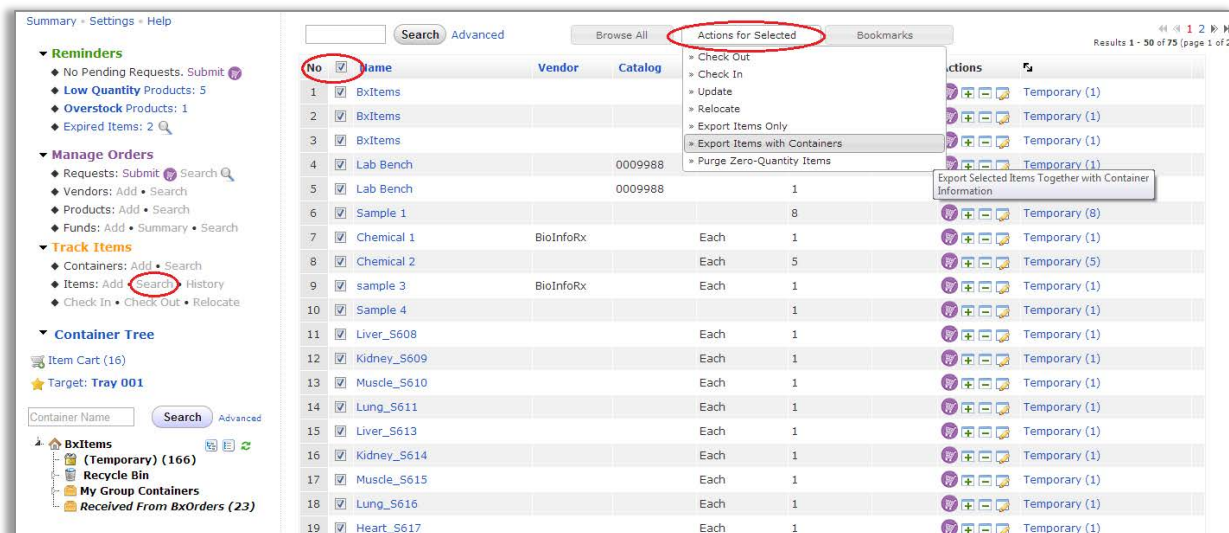
## Section 9: Exporting Items and Containers

All exports are in Excel CSV format, and will download automatically when requested.

### 9.1: Export Items

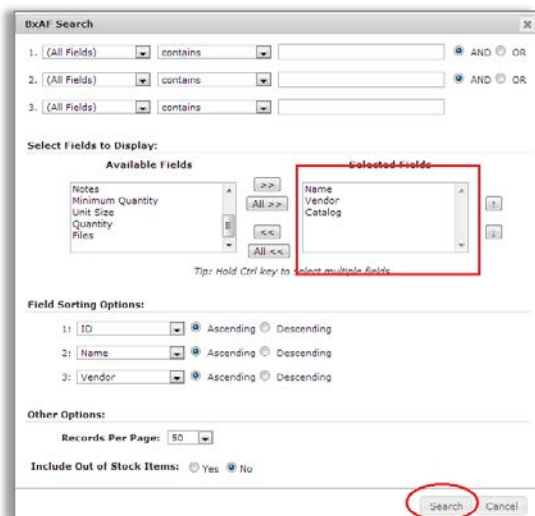
#### 9.1.1: Basic Export

Go to **Items – Search** and **Browse All**. Select all items to export, and click **Actions For Selected – Export Items Only** or **Export Items With Containers**.



#### 9.1.2: Advanced Export

To export selected fields, go to **Advanced** before exporting. Move desired fields to export to selected fields and click **Search**. Proceed to export as shown above.



## 9.3: Export All Items

To export all items in one full export, go to **My Group Containers – Export All Items**.

Summary • Settings • Help

Container: **My Group Containers** [Add Containers](#) [Add Items](#) [Export All Items](#) [Recycle All Containers and Items](#)

BxItems » My Group Containers

QR Code: 9000023

ID: 9000023  
Name: My Group Containers  
Capacity: 500  
Type: SYSTEM\_CONTAINER\_GROUP  
Description: My Group Top Container

Sub-containers [List View](#) [Icon View](#)

No.	ID	Name	Capacity	Type	Description	Notes
1	90000543	Room 001	500	Container	Freezer Storage Room	

Stored Items (0 / 500) [List View](#) [Icon View](#) [Store Items Here](#)

Container Name  [Search](#) [Advanced](#)

Item Cart (16)  
Target: **Tray 001**

BxItems  
(Temporary) (166)  
[Recycle Bin](#)  
**My Group Containers**  
Room 001  
Received From BxOrders (23)

## Section 10: Barcode Printing

Any label printer can print barcodes from Excel files. Some may require software. Export the items to print barcodes, and print the barcode field (saving the file as csv is standard).

### 10.1: Export Items For Barcode Printing

**Step 1:** Go to **Search** or **Browse** Items to begin your export. Search for certain items to export, or select all. Go To **Actions For Selected – Export Items Only**. Your CSV File will download.

Summary • Settings • Help

sample [Search](#) [Advanced](#) [Browse All](#)

Actions for Selected [Bookmarks](#)

No.	Name	Vendor	Catalog	
1	Heart_S617			
2	Heart_S617			
3	Kidney_S609			
4	Kidney_S609			
5	Kidney_S614		Each	1
6	Kidney_S614		Each	1
7	Liver_S608		Each	1
8	Liver_S608		Each	1
9	Liver_S613		Each	1
10	Liver_S613		Each	1
11	Lung_S611		Each	1
12	Lung_S611		Each	1

Actions for Selected:  
» Check Out  
» Check In  
» Update  
» Relocate  
» **Export Items Only**  
» Export Items with Containers  
» Purge Zero-Quantity Items

**Step 2:** Open your Excel spreadsheet. There will be several fields. Delete fields you do not need.

**Item ID** will be the 1D barcode number, and **item url** will be the QR code number.

**Choose additional fields for your label, such as Item name, Expiration. Delete all others.**

Item ID	Item URL	Name	Quantity	Vendor	Catalog	Unit Size	Description	Type	Lot Numb	Expiration Date	Notes	Minimum Quantity
1000510	http://labinfoman.cor	Sample 1	8							3/15/2013		
1000513	http://labinfoman.cor	sample 3	1	BioInfoRx		Each		Supplies				0
1000514	http://labinfoman.cor	Sample 4	1					Samples				
1001409	http://labinfoman.cor	Liver_S608	1			Each	Liver Sample, Mouse S608				Demo_data	
1001410	http://labinfoman.cor	Kidney_S609	1			Each	Kidney Sample, Mouse S609				Demo_data	
1001411	http://labinfoman.cor	Muscle_S610	1			Each	Muscle Sample, Mouse S610				Demo_data	
1001412	http://labinfoman.cor	Lung_S611	1			Each	Lung Sample, Mouse S611				Demo_data	
1001413	http://labinfoman.cor	Liver_S613	1			Each	Liver Sample, Mouse S613				Demo_data	
1001414	http://labinfoman.cor	Kidney_S614	1			Each	Kidney Sample, Mouse S614				Demo_data	
1001415	http://labinfoman.cor	Muscle_S615	1			Each	Muscle Sample, Mouse S615				Demo_data	
1001416	http://labinfoman.cor	Lung_S616	1			Each	Lung Sample, Mouse S616				Demo_data	
1001417	http://labinfoman.cor	Heart_S617	1			Each	Heart Sample, Mouse S617				Demo_data	
1001440	http://labinfoman.cor	Liver_S608	1			Each	Liver Sample, Mouse S608				Demo_data	
1001441	http://labinfoman.cor	Kidney_S609	1			Each	Kidney Sample, Mouse S609				Demo_data	
1001442	http://labinfoman.cor	Muscle_S610	1			Each	Muscle Sample, Mouse S610				Demo_data	

**For 1D Barcodes, your final sheet should look something like this.**

Item ID	Name	Expiration Date
1000510	Sample 1	3/15/2013
1000513	sample 3	
1000514	Sample 4	
1001409	Liver_S608	
1001410	Kidney_S609	
1001411	Muscle_S610	
1001412	Lung_S611	
1001413	Liver_S613	
1001414	Kidney_S614	
1001415	Muscle_S615	
1001416	Lung_S616	
1001417	Heart_S617	
1001440	Liver_S608	
1001441	Kidney_S609	

**For QR codes, your final sheet should look something like this.**

A	B	C	D
Item ID	Item URL	Name	Expiration Date
1000510	http://labinfoman.cor	Sample 1	3/15/2013
1000513	http://labinfoman.cor	sample 3	
1000514	http://labinfoman.cor	Sample 4	
1001409	http://labinfoman.cor	Liver_S608	
1001410	http://labinfoman.cor	Kidney_S609	
1001411	http://labinfoman.cor	Muscle_S610	
1001412	http://labinfoman.cor	Lung_S611	
1001413	http://labinfoman.cor	Liver_S613	
1001414	http://labinfoman.cor	Kidney_S614	
1001415	http://labinfoman.cor	Muscle_S615	
1001416	http://labinfoman.cor	Lung_S616	
1001417	http://labinfoman.cor	Heart_S617	
1001440	http://labinfoman.cor	Liver_S608	
1001441	http://labinfoman.cor	Kidney_S609	
1001442	http://labinfoman.cor	Muscle_S610	
1001443	http://labinfoman.cor	Lung_S611	
1001444	http://labinfoman.cor	Liver_S613	
1001445	http://labinfoman.cor	Kidney_S614	
1001446	http://labinfoman.cor	Muscle_S615	

**Step 3:** Save your file as a CSV file for label printing.

## 10.2: Print Barcode Label

Your completed export file is now ready to connect to your label printer.

Container ID's may also be printed, such as barcodes and labels for freezers, using the same steps.

BxInventory recommends and fully supports Bartender Barcode Label Software, which can be purchased with BxInventory. See our [printer guide](#) documents for further information on barcode printing.